Events

Help Documentation

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.

Managing Access to Events

Although there are many useful implementations for SmarterTrack's Events systems, some companies may wish to disable it. Alternatively, they may want to disable it just for Agents, but leave it active for Managers and/or System Administrators. Using the Roles system in SmarterTrack, this is very easy to do. Therefore, to prevent Agents from accessing and using the Events system, the System Administrator just needs to edit the proper Role permissions.

Follow these steps to disable agent access to the Events system for Agents:

- Log in to the SmarterTrack management interface as a System Administrator.
- Click on the Menu icon, and from the dropdown select Settings .
- Under the Manage header, click Roles in the navigation pane. A list of available Roles will load in the content pane.
- Select the desired Role (in this example, Agent) and click the Edit button. (Alternatively, you can double click on the Role name.)
- Click the Options tab.
- In the Events field, select Custom from the list. This will enable the Events tab.
- Click the Events tab.
- To disable the Role from using the Events system, uncheck the Create and Edit My Events checkbox. This prevents that Role from being able to create any Events for Agents that have

that Role.

• Click Save .

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.