



General Information

Help Documentation

General Information

What is SmarterTrack?

SmarterTrack is, at its core, a communication platform. With it, businesses and individuals are able to interact with their customers and end users using one or more communication channels -- from email, live chat and phone calls to the creation of self-help communities and resources. In addition, SmarterTrack offers a number of internal communication methods so that employees, agents and managers can get the help they need, when they need it. Features include:

- World-class ticketing solution
- Interactive live chat
- Comprehensive knowledge base
- Customer community
- Public Web portal
- Call logs and VoIP integration
- SIP-compliant softphone
- Who's On visitor monitoring
- Complete task management system
- Time logs
- Self-help resources: knowledge base, news items, etc.
- Multiple brand support
- Integrated survey system
- Customizable forms
- Organizations for grouping communication by customer
- More than 70 summary and trend reports
- Support for Single Sign-On (SSO)
- And more...

SmarterTrack is a complete customer service solution for individuals, small businesses, and enterprise organizations and is available as a traditional software installation or as a hosted service. In addition to providing your company with an effective customer support structure, SmarterTrack offers powerful tracking and effective reporting that help to manage company costs and employee scheduling.

What is SmarterTrack Communicator?

SmarterTrack Communicator is a SIP-compliant voice over IP (VoIP) softphone that seamlessly integrates a company's phone system with SmarterTrack. It is a licensed add-on and is configurable

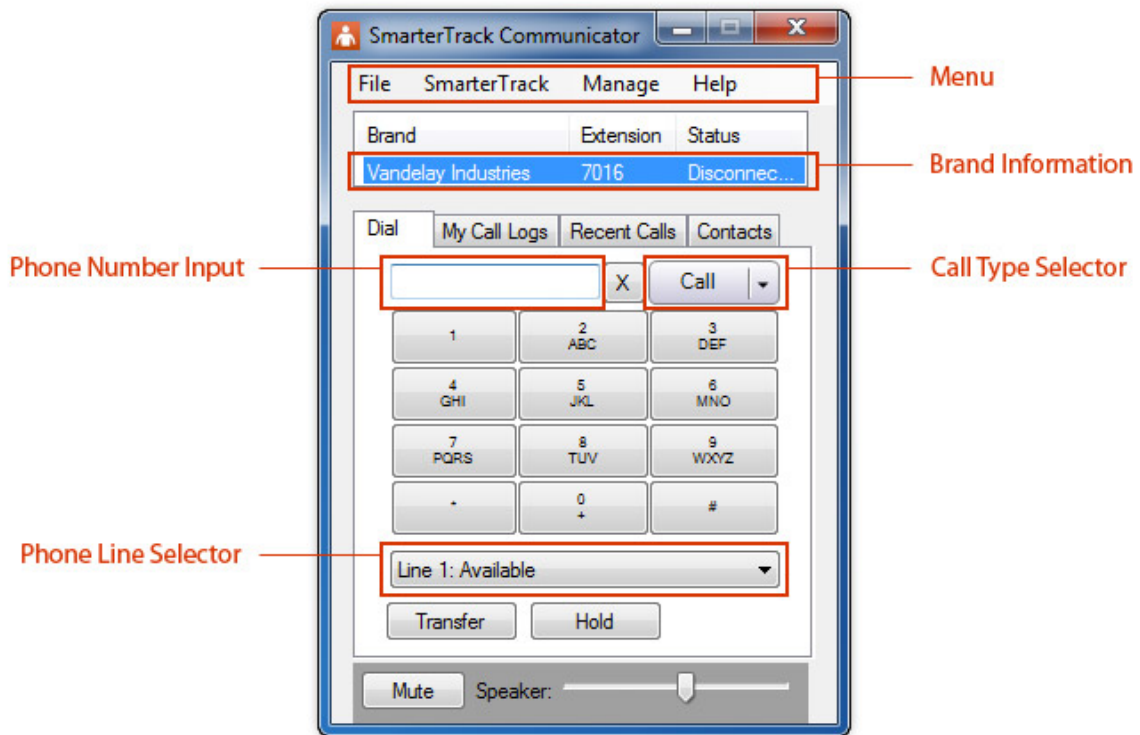
from within SmarterTrack, which means that all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to transfer calls, automatically create call logs, display incoming and outgoing call information, record calls for later review, offer complete call analytics and allow businesses to keep all customer communication (tickets, live chats and call information) in one location.

Note: The .NET 4.0 framework is required and should be installed on the laptop or desktop that will be running SmarterTrack Communicator. You can download the Web installer for .NET from the Microsoft Download Center .

SmarterTrack Communicator offers all of the features of standard VoIP softphones, including:

- The ability to record incoming and outgoing calls
- The ability to transfer calls between agents and departments
- Multi-line support
- Complete call history
- Phone contact list
- Recent call log
- Automatic call log creation
- Volume controls
- Mute button
- The ability to display incoming call info
- Multi-brand support

To better understand the different areas of the SmarterTrack Communicator, please refer to the diagram below:



SmarterTrack Edition Explanation

Professional Edition vs. Enterprise Edition

SmarterTrack Professional has all of the features required to manage a fully-functional help desk.

SmarterTrack Enterprise offers additional features, including:

- Scheduled and on-demand email reports
- Customer satisfaction surveys
- Customizable forms
- Single Sign-On (SSO)
- Support for multiple brands
- External providers
- Instant Message and Chat Room features for agents
- Failover functionality Note: Requires a SmarterTrack Enterprise with Failover functionality license.

SmarterTrack Hosted Helpdesk

The Hosted SmarterTrack Helpdesk (SaaS) offers all of the Enterprise edition features, with the exception of Active Directory as an agent authentication method, as well as free access to SmarterTrack's VoIP softphone, Communicator.

SmarterTrack Free

SmarterTrack Free contains much of the same functionality as SmarterTrack Enterprise, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

SmarterTrack Edition Comparison

You can also refer to the following edition comparison chart for more information about each edition.

Management Interface

Features	Free 1	Pro	Enterprise
Tickets			
Agent responses by email	•	•	•
Transfer tickets (to agents, departments, groups and other installations)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Automatically suggests related tickets and knowledge base articles	•	•	•
Comments and resolutions	•	•	•
View/search ticket history	•	•	•
Canned replies	•	•	•
Mark tickets for follow-up	•	•	•
Ticket surveys	•		•
Ticket forms	•		•
Advanced ticket searching	•	•	•
Define custom fields for tickets	•	•	•
Force complete custom fields (agents only)	•	•	•
Instant Message feature for agents	•		•
Multiple user-defined signatures per agent	•	•	•

Enforceable company-wide signature standard	•	•	•
Dynamic signature attributes by brand, language, etc.	•	•	•
Intelligent ticket routing (via cherry picking or round robin)	•	•	•
Custom ticket distribution options using Events	•	•	•
Tickets assigned to agent's brand and/or language	•		•
Automatic and manual rebalancing of ticket workload	•	•	•
Time logging	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Handle chats inline or as a popup	•	•	•
Audible and visual alerts	•	•	•
Chat idle time warning levels	•	•	•
Transfer chats (to agents, departments, and groups)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Automatically suggests related knowledge base articles	•	•	•
View/search chat history	•	•	•
Automated responses	•	•	•
Live chat surveys	•		•
Live chat forms	•		•
Advanced chat searching	•	•	•
Define custom fields for chats	•	•	•

Force complete custom fields (agents only)	•	•	•
Available/Unavailable settings when going AFK	•	•	•
Get Assistance feature for agents	•		•
Google Maps and Bing Maps integration	•	•	•
Manage chat queues	•	•	•
Multiple chat session support	•	•	•
Co-chat with other agents	•	•	•
Administrator participation without transfer (coaching)	•	•	•
Agent chat rooms	•		•
Agent instant messaging	•		•
Automatic agent failover	•	•	•
Support for alternate agent avatars and identities (aliases)	•	•	•
Intelligent routing (via cherry picking or round robin)	•	•	•
Custom chat distribution options	•	•	•
Live chats assigned by agent's brand and/or language	•		•
Time logging	•	•	•
Calls			
Track incoming and outgoing phone calls	•	•	•
Automatically suggests related knowledge base articles	•	•	•
Cross-associate tickets, live chats, calls and tasks	•	•	•
Integration with most VoIP systems	•	•	•
Click-to-call functionality	•	•	•

SIP-compliant softphone		Add-on	Add-on
Tasks			
Time logging	•	•	•
Assign tasks to agents	•	•	•
Assign a status to a task (approved, in progress, etc.)	•	•	•
Create recurring tasks	•	•	•
Visual alerts for overdue tasks	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Managers can view and track tasks for their departments	•	•	•
Who's On			
Live monitoring of users on website	•	•	•
Filter visitors by brand, page, or any available attributes	•		•
Advanced visitor and session display in preview pane	•	•	•
Integrated with live chat for pushing and inviting of live chats	•	•	•
Filtering of users on website	•	•	•
World geographic density map	•	•	•
Who's On surveys	•		•
Integrated with events system for automated actions	•	•	•
Knowledge Base			
Embed document links in KB articles and news items (attachments)	•	•	•
Embed flash files (.swf) in KB articles and news items	•	•	•
Embed media files in KB articles and news items	•	•	•

Organize KB articles and news items by brand	•		•
Edit multiple KB articles concurrently	•	•	•
HTML tag stripping tool	•	•	•
Set stale dates for KB articles	•	•	•
Mark KB articles for review	•	•	•
View statistics for a KB article	•	•	•
View unsuccessful KB search queries	•	•	•
KB article comments	•	•	•
Check articles for broken links	•	•	•
Quick comment moderation	•	•	•
Assign articles to agents for creation	•	•	•
Events And Notifications			
Event-driven architecture	•	•	•
Notification profiles	•	•	•
Combine multiple actions into a single, manual event	•	•	•
Assign actions to events (.e.g. transfers, escalations, notifications)	•	•	•
Service Level Agreements (SLA) compatible	•	•	•
Automatically launch surveys from events	•		•
Assign actions to monitored survey results	•		•
Compatible with SmarterNotify real-time notifications	•	•	•
Reporting			
Over 30 summary reports	•	•	•
Over 30 trend reports	•	•	•
Cost analysis reports	•		•

Multiple event reports	•		•
Survey reports by agent, department, or group	•		•
Custom field reports	•		•
Scheduled and on-demand email reports	•		•
Define custom reports	•		•
Dual-axis charting	•	•	•
Administration			
Agent roles system	•	•	•
Define company structure	•	•	•
Multiple brand support	•		•
Active Directory authentication	•	•	•
Hidden departments	•	•	•
Agent avatars to personalize customer communication	•	•	•
Assign departments to a specific language	•	•	•
Assign departments and agents to specific brands	•		•
Real-time monitoring of tickets	•	•	•
Real-time monitoring of live chats	•	•	•
Supervisor monitoring	•	•	•
Quality control	•	•	•
Master categories for improved organization	•	•	•
Monitor live chat rooms	•		•
Monitor and review individual surveys	•		•
Optimized database for large volumes	•	•	•
Minimum password requirements and enforcement	•	•	•
Extensibility			

External providers with custom fields	•		•
Define custom fields for live chats and tickets	•	•	•
Link to third-party databases via external providers	•		•
Authenticate customer and agent logins via third-party sources	•		•
Web services allow for integration into other applications	•	•	•
Web Interface			
Custom CSS for customization of the customer portal and management interface	•	•	•
Optimized controls provide desktop application performance	•	•	•
Responsive design that works on both mobile and desktop browsers	•	•	•
Multi-language compatible	•	•	•
AJAX spell-check	•	•	•
Rich text editing	•	•	•
Compatible with most tablets (iPad, Nexus 7, etc.)	•	•	•
Installation			
Hosted service option (SaaS)			•
Failover functionality 2			•
VPS server installation option	•	•	•
Shared server installation option	•	•	•
IIS 7.0+ supported	•	•	•
Compatible with shared hosting environments	•	•	•

Supports SQL Server 2008 R2 and higher	•	•	•
Supports SQL Server Express Edition	•	•	•
Implementation in Microsoft .NET 4.7	•	•	•

Portal Interface

Features	Free	Pro	Enterprise
Tickets			
Submit tickets through the portal	•	•	•
Submit tickets through email	•	•	•
Automatically suggests related KB articles during ticket submission	•	•	•
Insert attachments (configurable)	•	•	•
Capture visitor data (custom fields)	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Enabled chat links into website	•	•	•
Online/offline indication	•	•	•
Send files via live chat	•	•	•
Agent typing indicator	•	•	•
Capture visitor data (custom fields)	•	•	•
Email and print live chat transcripts (customer side)	•	•	•
Customizable chat icons	•	•	•
Detect and recover from lost connection	•	•	•
Knowledge Base			
KB article translation (link to manual translations or auto-translate with the built-in translation tool)	•	•	•

SEO-friendly article representation	•	•	•
Organized by category	•	•	•
Searchable (full natural search support)	•	•	•
Private KB articles	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Security			
Define role permissions for agents and end-users	•	•	•
Extended pre-defined roles (e.g. everyone, agent, registered user)	•	•	•
CAPTCHA support for ticket/thread submission and user registration (optional)	•	•	•
Anonymous/registered/authenticated user methods	•	•	•
News			
Multi-lingual support for all news items	•	•	•
SEO-friendly	•	•	•
RSS feeds	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Web Interface			
Tabbed interface for improved organization	•	•	•
Multi-lingual support for all interface text	•	•	•
Customizable company logo	•	•	•
Google Analytics integration	•	•	•
Compatible with most popular Web browsers	•	•	•

Compatible with most mobile devices and tablets (iPad, iPhone, Android, etc.)	•	•	•
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1 SmarterTrack Free Edition contains much of the same functionality as SmarterTrack Enterprise Edition, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

2 Requires activation of the SmarterTrack Enterprise with Failover Functionality license.

How SmarterTrack Works

There are two main components that work together within SmarterTrack: the Web interface and the database backend. Both components must be active for SmarterTrack to operate.

Web Interface

The Web interface is a website that is used for administration and interactivity with SmarterTrack. It is divided into two components: the management interface and the portal interface. Administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets and chats. Customers can use the portal interface to retrieve ticket information, submit new tickets and chats, search Knowledge Base articles, or participate in the Community.

SmarterTrack Communicator

SmarterTrack Communicator is a SIP-compliant softphone that works with all major SIP-compliant VoIP phone servers. SmarterTrack Communicator is a licensed add-on and is configurable from within SmarterTrack. Therefore, all settings, profiles and agent information are pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to transfer calls, automatically create call logs, display incoming and outgoing call information, record calls for later review, offer complete call analytics and allow businesses to keep all customer communication (tickets, live chats and call information) in one location.

Database Backend

SmarterTrack needs a database to store data. For SmarterTools customers using Hosted SmarterTrack, the database backend is installed on servers managed by SmarterTools. For more information regarding the database backend requirements, see [Setting Up the Database](#) .