



# Users / Organizations

Help Documentation

## Users / Organizations

### Users / Organizations Overview

The Users / Organizations section allows agents to view all customer communication from one, convenient location. Users (those who use SmarterTrack to submit the inquiries, issues and comments that agents work on) can be viewed individually to see their profile information, statistics of their contact with your agents, communication via tickets, live chats and calls, survey history and more.

Multiple users can also be grouped together into an Organization that displays all of the tickets, live chats, call logs and surveys associated with its users. This is convenient for when more than one person is in contact with your company. For example, two users may be working together to complete a purchase. One of them will decide which product is needed; the other will complete the purchase. When the purchaser calls in to make complete the transaction, rather than searching through all tickets, live chats and calls, the agent can simply look at their Organization to see their collaborative wants and needs.

To access the users and organizations, log into SmarterTrack as an agent and click on the Users / Organizations icon . A list of all configured users will load in the content pane.

For help understanding the different areas of the Users / Organizations section, see the two interface diagrams for Users and Organizations .

### Navigating Users

In general, the following rows are available in the content pane when viewing the list of users:

- Display Name - The "friendly" name of the user.
- Username - The name used by the user to login to the Portal.
- Verified - A yes/no indication of whether the user's email address has been verified.
- Last Login - The date and time in which the employee last logged into SmarterTrack.

### Navigating Organizations

In general, the following columns are available in the content pane when viewing organizations:

- Organization Name - The name of the organization.
- Website - The website associated to the organization.
- Phone Number - The phone number that is associated to the organization.

## Performing User / Organization Actions

In general, the following actions are available from the content pane toolbar:

- New - Creates a new user or organization.
- Delete - Deletes the selected users or organizations. For more information, see [Deleting Users](#) and [Deleting Organizations](#) .
- Sort - Allows agents to sort the list of Users and Organizations based on specific pieces of information, such as email address, website, etc.

## Creating New Users

To create a new user, log into SmarterTrack as an agent and click on the Users / Organizations icon . Then click New in the content pane toolbar. A new user window will open that the agent will use to create the user.

The new user window contains a tab to set the profile information for the user, a tab to configure standard options, such as a user's signature and avatar, a tab to choose roles to be associated to the user and a tab where the user's custom field data can be entered.

### Details

Use this tab to configure the profile details of the user:

- Username - The username that will be used to log into SmarterTrack.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow users 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 retyping it in this field.
- Email Address - The user's email address.
- Display Name - The friendly name used to identify the user within the SmarterTrack system.
- Address - The physical address of the user.
- 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 user. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.

## Contact Info

Use this tab to set specific contact details for the user:

- Website - The user's personal website.
- Home Phone - The user's home phone number.
- Cell Phone - The user's cell phone number.
- Work Phone - The user's work phone number.
- Other Phone - The user's alternate phone number.
- Company - The name of the company the user works for
- Address - The user's physical address.

## Portal Settings

Use this tab to configure standard Portal options for the user:

- Avatar Provider - SmarterTrack allows 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 one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.
- Subscribe to community posts automatically - Checking this box allows the user to automatically be subscribed to Community threads that they create or post in.
- Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads users are 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 the user participated in.
- Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.
- Banned from community - Checking this box will ban the user from participating within the Community. While Community threads may be viewed, the user will not be able to reply to threads, comment on replies, vote on threads, etc. Banning a user here will display the user on the Banned tab within the Community, and banning a user in the Community will enable this setting. Note: Banning a user in the Community can only be done if the user has been reported

for abuse.

- Portal Signature - Use this field to create an HTML-rich signature that will be displayed in the Portal, such as in Community threads and replies.

## Roles

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

## Custom Fields

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

## Viewing Users

To view a user, simply click on the desired row and the user details will load in the preview pane. If you would rather view the user in a popup window, double-click the user instead. Note: Double-clicking a user also enables you to edit the user.

The screenshot displays a user management interface. On the left is a navigation pane with categories like 'Users' and 'Organizations'. The main area shows a list of users, with 'Bob Smith' selected. The right side features a 'Preview Pane' for Bob Smith, showing his profile information and a toolbar with options like 'Edit', 'Add', 'Options', 'Contact Info', 'Portal Settings', 'Roles', 'Custom Fields', 'Comments', 'Tickets', and 'Live Chats'. The interface is annotated with colored boxes: a pink box around the 'New Item' button, a purple box around the top navigation bar, an orange box around the left navigation pane, a green box around the user list, and a blue box around the preview pane.

In general, the following options are available from the preview pane toolbar:

- Edit - Allows the agent or administrator to modify the selected user.
- Add - Allows you to add items to the particular user:
- Comment - Add a comment about a particular user that's available to other agents and managers, but NOT available to the general public.

- New Ticket - Creates a new ticket with the user's email address in the To field.
- New Call Log - Creates a new call log with the user's email address in the Email field.

## Tabs within a User Preview

A user's details are organized within the following tabs:

- Details - Displays the profile information for the user, such as their username, email address, preferred language, etc.
- Contact Info - Lists any contact information about the user, such as their phone number(s), home address, etc.
- Portal Settings - Shows the user's portal settings, such as their avatar, the settings selected for community actions and more.
- Roles - Lists the available roles and denotes which of them are assigned to the user.
- Custom Fields - Displays the custom fields that have been configured for the user.
- Comments - Displays any agent-added user comments. Note: User comments can be added by clicking Add in the toolbar of the User pop up window.
- Tickets - Displays all of the tickets that have been submitted under the user's email address.
- Live Chats - Displays all of the live chats this user has started with their account email address.
- Calls - Displays all of the call logs the user is associated to.
- Surveys - Displays all survey results for surveys the user has completed.
- Statistics - Displays statistics regarding the user's ticket submissions, live chats, calls and time logs.
- History - Displays information about the date and time of the user's last login, ticket, live chat, call and time log.

## Viewing Users by Role

The navigation pane lists every role that can be applied to end users. To view a list of all users assigned to a specific role, expand the Users folder and click on the desired role. The list of users will load in the content pane.

## Deleting Users

On occasion, an agent or administrator may need to delete a user from the system. Note: The ability to delete a user is determined by the role permissions. By default, agents cannot delete users. For more information, see Roles .

To delete a user, simply select the desired user(s) in the content pane. Then click Delete in the content pane toolbar. Once a user is deleted, it cannot be recovered.

## Searching Users

To perform a basic user search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search in the role section you are viewing (i.e. Registered User, Everyone, etc.) for matches and display the results in the content pane.

## Creating New Organizations

Multiple users can be grouped together into an Organization that displays all of the tickets, live chats, call logs and surveys associated with its users. This is convenient for when more than one person is in contact with your company. For example, two users may be working together to complete a purchase. One of them will decide which product is needed; the other will complete the purchase. When the purchaser calls in to make complete the transaction, rather than searching through all tickets, live chats and calls, the agent can simply look at their Organization to see their collaborative wants and needs.

To create a new organization, log into SmarterTrack as an agent and click on the Users / Organizations icon . In the navigation pane, click on All . Then click New in the content pane toolbar. The new organization pop up will open in a new window, and the following tabs will be available:

### Details

- Organization Name - The name of the organization.
- Website - The organization's company website.
- Phone Number - The organization's phone number.
- # of Employees - A range for the number of employees for the organization.
- Address 1 - The physical street address of the organization, such as 123 W. Main .
- Address 2 - Additional address information such as suite number, floor, etc.
- City - The organization's city.
- State/Province - The state or province for the organization.
- Zip/Postal Code - The zip code or postal code for the organization.
- Country - The country where the organization is located.

### Members

Use the Members tab to configure the filters that will determine the users that are associated with this organization. To add a new filter, click the Members button. Then choose Add . There are 4 filter types for adding members to an organization:

- Email Address - Used to add specific users into the organization by typing in their full email address. This is best used when you want to limit an Organization to only specific members.

- Username - Used to add specific users into the organization by typing in their specific username(s). As with Email Address, this is best used to limit an Organization to specific members.
- Domain Name - Used to add any users whose email address includes a specific domain name. To add any matching users, choose this filter type and enter the domain name (e.g., example.com). This is best used to capture any and all tickets, live chats, call logs and surveys submitted by any member of a specific domain.
- Phone Number - Used to add any users that have a matching phone number in their profile. To add any matching users, choose this filter type and enter the phone number.

### **View Organization Tickets in Portal**

Certain members can be granted permission to view all tickets that are associated with the organization. When a member is added by Username, Email Address or Domain, the setting, "View Organization Tickets in Portal", can be enabled. When this option is selected, the users will find an Organization tab on the Tickets page when they are logged in at the Portal.

Note: When a member that's added by Domain or Email Address is granted "View Organization Tickets in Portal" permissions, only the users who have the Registered User with Verified Email role will be able to view the organization's tickets at the Portal. For example, imagine I added a new member by Domain: example.com, and I enabled permission to view the organization's tickets. Only the user accounts that contain an email address matching that domain and that have the Registered User with Verified Email role will be able to view the tickets submitted by all other members of the organization. However, when I add a member by Username and enable permission to view the organization's tickets, that user can view organization tickets, regardless of their verification status. Members added by phone number cannot be granted permission for viewing organization tickets.

### **Comments**

Use the Add button to add internal comments that can only be viewed by other agents. If a comment has been added about the Organization, it will appear here. In addition, a number appears showing the how many comments have been made about the Organization. If there is no number, then the Organization doesn't have any comments.

When an organization has been created, tickets, live chats, call logs and surveys associated to each member are pulled in and organized within the following tabs:



## Tickets

This tab lists the tickets that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Display tickets that are associated with that user's account.
- Members by Email Address - Displays tickets where the member's email address is contained in the ticket's primary list of email addresses (the email addresses in the ticket header). Note that this only checks the email address for the ticket; it does not check the email address for any related user accounts.
- Members by Domain - Displays tickets where the member's domain is included in the ticket's primary list of email addresses (the email addresses in the ticket header). Note that this only checks the email address for the ticket; it does not check the email address for any related user accounts.
- Members by Phone Number - Displays any tickets associated with a user account that contains the member's phone number.

## Live Chats

This tab lists the live chats that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays chats that are associated with the username's Used ID.
- Members by Email Address - Displays chats where the member's email address matches the email address of the chat. Note that this only checks the email address of the chat; it does not check the email address for any related user accounts.
- Members by Domain - Displays chats where the domain of the user's email address matches the member's domain. Note that this only checks the email address for the chat; it does not check the email address for any related user accounts.
- Members by Phone Number - Displays chats where the account for the user (if any) has the member's phone number.

## Call Logs

This tab lists the call logs that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays call logs where the email address matches the email address for the member's account.
- Members by Email Address - Displays call logs where the email address matches the email address for the member's account.

- Members by Domain - Displays call Logs where the domain of the email address matches the member's domain.
- Members by Phone Number - Displays call Logs where the phone number matches the member's number.

## Surveys

This tab lists the surveys that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays surveys where the user ID that the survey was sent to matches the member's user account.
- Members by Email Address - Displays surveys where the email address that the survey was sent to matches the member's email address.
- Members by Domain - Displays surveys where the domain of the email address that the survey was sent to matches the member domain.
- Members by Phone Number - Displays surveys sent to a user who has a phone number that matches the member's number.

## Viewing Organizations

To view an organization, simply click on the desired row. The organization details will load in the preview pane. If you would rather view the organization in a popup window, double-click the organization instead. Note: Double-clicking an organization also enables you to edit it.

The screenshot shows a software interface with a top toolbar containing icons for home, chat, call, checkmark, users, help, list, RSS, bar chart, cloud, settings, and a 'New Item' button. Below the toolbar, the interface is divided into three main sections:

- Navigation Pane (left):** Contains a 'Users' section with roles like 'Everyone', 'Registered User', and 'Moderator'. Below it is an 'Organizations' section with an 'All' filter.
- Content Pane (middle):** Displays a list of organizations. Each entry includes the organization name, URL, and phone number. The organizations listed are:
  - ABC Company (http://www.abccompany.com, 555-555-5555)
  - DEF Company (http://www.abccompany.com, 555-555-1111)
  - GHI Company (http://www.abccompany.com, 555-555-2222)
  - JKL Company (http://www.abccompany.com, 555-555-3333)
  - MNO Company (http://www.abccompany.com, 555-555-4444)
  - PQR Company (http://www.abccompany.com, 555-555-6666)
- Preview Pane (right):** Shows details for 'ABC Company' (http://www.abccompany.com). It includes a toolbar with 'Members' and 'Edit' buttons. Below is a table with columns 'Type' and 'Value':
 

Type	Value
Domain Name	abccompany.com

In general, the following options are available from the preview pane toolbar:

- Edit - Allows the agent or administrator to modify the selected organization.
- Members - Allows the agent or administrator to add, edit or delete filters for the organization.
- Add - Allows you to add items to the particular Organization:
- Comment - Add a comment about a particular Organization that's available to other agents and managers, but NOT available to the general public.
- New Call Log - Creates a new call log with the user's email address in the Email field.

## Tabs within an Organization Preview

An organization's details are organized within the following tabs:

- Details - This tab shows the information added when the Organization was initially created.
- Members - This shows the "filters" used to add Members to the Organization.
- Comments - If a comment has been added about the Organization, it will appear here. In addition, a number appears showing the how many comments have been made about the Organization. If there is no number, then the Organization doesn't have any comments.
- Tickets - This tab lists the tickets that are associated with members of the Organization.
- Call Logs - This tab lists the call logs that are associated with members of the Organization.
- Live Chats - This tab lists the live chats that are associated with members of the Organization.
- Surveys - This tab lists the surveys that were submitted from members of the Organization.

## Deleting Organizations

On occasion, an agent or administrator may need to delete an organization from the system. Note: The ability to delete an organization is determined by the role permissions. By default, agents cannot delete organizations. For more information, see Roles .

To delete an organization, simply select the desired organization(s) in the content pane. Then click Delete in the content pane toolbar. Once an organization is deleted, it cannot be recovered.

## Searching Organizations

To perform a basic organization search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will search all of the configured organizations and display the results in the content pane.