



Getting Started

Help Documentation

Getting Started

Now that you have SmarterTrack installed, it's time to get things set up. Below are some helpful links to get you started.

If you're not quite to the point of getting SmarterTrack installed, that's okay: SmarterTools offers complimentary installation of any new license purchase! You should have seen that as an option when you placed your order but if not, just email us at sales@smartertools.com and we can help get you scheduled. In addition, SmarterTools offers paid training to help get you on your way to expert mail server management.

Installing SmarterTrack

Installing SmarterTrack is a relatively simple process. However, we do offer a step-by-step walkthrough of the entire process, from installing the application to walking through the set up wizard.

- [Installation Process](#)

Basic Concepts

Once you get SmarterTrack installed, it helps to familiarize yourself with the concepts around the various features it has to offer. Below are a few things to get you started.

- [Company Organization](#)
- [Understanding Tickets](#)
- [Understanding Live Chats](#)
- [Understanding Active Groups](#)
- [Understanding Users / Organizations](#)
- [Defining Workflow and SLAs](#)

SmarterTrack Organization

SmarterTrack is organized in a top-down structure: You start with a Brand, then add in Departments, then Groups for each Department. Then you add Employees, or Agents, to the Groups. And each Employee you add can have various Roles.

- [Brands](#)
- [Departments](#)
- [Groups](#)
- [Employees](#)
- [Roles](#)

Configuration Items

Once installed and set up, SmarterTrack pre-populates some information to help get you started: A news item, an initial ticket, etc. However, there are some things you'll want to get set up prior to making your help desk live.

- Email Set Up
- Live Chat Set Up
- Ticketing
- Basic Security

Logging In

Once you get SmarterTrack initially configured, you're logged in to the interface -- either the Portal or the Management Interface -- automatically. However, after that you and your Agents will need to log in again. In addition, it's good to understand Agent Availability, know what the Dashboards do, etc.

- Logging in to SmarterTrack
- Agent Status
- Dashboards

Tickets

Tickets are the lifeblood of any help desk as they're the primary way employees interact with customers. Tickets can be submitted via the Portal, via email, or a combination of both. Each ticket is logged and tracked for easy reporting as well.

- Overview
- Ticket Distribution Methods
- Viewing Tickets
- Replying to Tickets

Live Chat

After email and tickets, live chat is probably the most common way customers interact with a company. Live chat is the ideal way employees can help customers in real-time. Chats are also logged and tracked for easy reporting.

- Overview
- Live Chat Distribution Methods
- Active Live Chat Groups
- Viewing Live Chats

Assistance

SmarterTrack gives users a few self-help options, such as an extensive Knowledge Base and a user-to-user Community. However, employees have resources as well, including the ability to instant message others within their Group or Department.

- Instant Messenger Overviews
- Knowledgebase Overview
- Creating KB Articles
- Canned Reply Overview
- Creating Canned Replies