



Help Documentation

SmarterTrack/WHMCS Addon Module

The WHMCS Module for SmarterTrack is an all-in-one client management system that is popular with WHM/CPanel users. With this module, you can completely override the basic support system inside of WHMCS, allowing you to use SmarterTrack to manage support tickets, live chats and knowledge base articles. This will also allow your support staff to manage your clients within the SmarterTrack interface without having to jump back and forth between WHMCS and SmarterTrack.

The WHMCS module is an open source module developed in PHP and can be used with both installed and hosted solutions of SmarterTrack.

NOTE: The WHMCS module provides a one-way sync from WHMCS to SmarterTrack. Any changes made within SmarterTrack will NOT be reflected in WHMCS.

Package Goals

The primary goal for the SmarterTrack/WHMCS module is to eliminate the multi-platform maintenance for customer support agents in a business. Agents can maintain support issues inside of SmarterTrack without having to worry about WHMCS at all. The WHMCS module provides the following:

- The ability to override the knowledge base links within WHMCS to redirect to SmarterTrack's knowledge base articles
- The ability to provide live chat support links within WHMCS that will pop up a SmarterTrack live chat within the WHMCS interface
- The ability to override the "contact us" email to start a ticket within SmarterTrack rather than an email to a chosen email address. The ticket will also have a different comment added to it that states it was submitted via Sales Acquisition. You get to specify which department these tickets are automatically submitted to.
- Full email ticket support, including:
 - Include / exclude departments based on settings within SmarterTrack
 - Full custom field support
 - A comment added to every ticket submitted to show it was created through WHMCS
 - Customizable auto responders with the ability to direct ticket links to WHMCS rather than SmarterTrack
 - View all tickets on the support tickets page and all open tickets on client area page
 - Restrict users from closing tickets based on settings set in SmarterTrack
 - Help phone number and / or email address to be displayed on error pages
 - Full email / username and password support. This means that whenever a client changes their

email or password in WHMCS, the change will also reflect within SmarterTrack

- A page in the management interface of WHMCS for syncing SmarterTrack and WHMCS users. (SmarterTrack uses the client's email address for the username)
- Full open source module with language string overrides, a custom style sheet and custom client template pages that can all be modified to serve a company's needs

Installation and Configuration

The WHMCS module has multiple versions available that can be used with existing installations of SmarterTrack 8.5 and above and WHMCS 5, 6 or 7. For information on installing and configuring the WHMCS module, please see the see the KB article, SmarterTrack/WHMCS Addon Module .