



Searching Live Chats

Help Documentation

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As time passes, finding a specific live chat can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find chats quickly and easily.

Basic Search

To perform a basic 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 within the area of the live chat section you are viewing (i.e. active, inactive etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a live chat. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all live chats EXCEPT deleted ones or to only search in deleted items.
- Chat Number - To search by chat number, enter the chat number in this field.
- Search String - Type the specific keywords to be queried. All sections of the chats will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Customer Name - To search by customer, enter the customer's name in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by chat status, select the appropriate status from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the

appropriate item from the list.

- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.