



# Custom Fields

Help Documentation

## Custom Fields

Some companies may want to gather information for tickets, live chats and call logs that is outside of the default information gathered by SmarterTrack. To do this, administrators can create an unlimited number of Custom Fields. Custom fields can be used to define virtually any additional information a company may need and can be applied to tickets, live chats, call logs, advanced searches, reports, and organizational settings (such as users, groups and departments). In addition, companies can use custom fields when creating communication templates for live chats or tickets to require end users to supply specific pieces of information to aid employees with troubleshooting issues or even looking up accounts as the live chat or ticket response progresses. Custom fields are also available in various summary and trend reports, giving managers the ability to group data items by the custom fields that are created. Note: Custom fields can be used to display up to 512 characters of information per field.

For example, a manager for a support department can add a custom field for the model numbers of their products, and then add that custom field to ticket and live chat templates that SmarterTrack uses. In addition, the custom fields are available when the manager runs reports, such as the Ticket Overview report, and they will be able to group the results by each model number.

Generally, there are two different types of custom fields:

- Regular custom fields are used to gather additional information on items agents may be working on, such as tickets, live chats and call logs. For example, if a company has multiple products for which they provide technical support, they may create a custom field for tickets that specifies which product the customer is requesting assistance with. Taking this example further, a company could use custom fields to require customers to provide specific information before submitting tickets or live chats: the customer's contact details, the browser they're using, their interest in promotional offers or partnership opportunities, etc. These custom fields use the Data type.
- Organizational custom fields are used to gather additional information on users, groups or departments. Unlike regular custom fields, organizational custom fields are created by the system administrator, but they are viewable by any agent or manager as well by selecting "User Details" from any email address associated with a ticket, live chat or call log. For example, a system administrator may use an organizational custom field to store details on a user, such as a phone number, account number, social media address or a note. These custom fields use the People type.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon. In the Configuration area of the navigation pane, click on Custom Fields . A list of custom fields will load in the content pane and the following tabs will be available:

## Fields

Use this tab to configure the field definition. If the custom field should be available to users when submitting new tickets or live chats, the field definition will then need to be added to a template.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple field definitions. Custom field definitions must be selected before choosing an action from the toolbar.
- **Field Name** - The name of the custom field.
- **ID** - The auto-generated internal ID that can be used with Web services and External providers.
- **Data Type** - The format in which the custom field data is provided.
- **Default Value** - The value assigned to the field by default, when the field is initially created.
- **Applies To** - Indicates whether the custom field applies to People or Data.

To view the details for a specific custom field, simply double-click the custom field. The custom field details will load in the content window and the following fields will be available:

- **Field Name** - The name of the custom field.
- **Applies To** - Custom fields can apply to Data or People. Data custom fields will be seen on tickets, live chats and call logs. They can be filled in by agents or users (if used on a ticket or live chat template). People custom fields are used only by agents and can be seen on user accounts. See above for information on the two different types of custom fields.
- **Data Type** - To specify the data type (text, drop down list, date, etc.), select the appropriate option from the list.
- **Default Value** - The default contents of the custom field. This field is optional, and is often left blank. However, it can provide useful in certain circumstances. For example, a company may want to create a custom field that allows customers to opt in or out of promotional emails. To encourage customers to opt in, the administrator may configure the default value to indicate that the customer is willing to receive promotional emails.

## Templates

SmarterTrack offers several default templates that can be used for call logs, live chats and tickets.

While these will accommodate most users of SmarterTrack, some companies may want to gather information that is not recorded in these default templates. Therefore, custom fields definitions can be used to define the additional information a company may need. These fields can be added to tickets, live chats, advanced searches, reports, and system settings. Note: Specifying which template to use for

tickets, live chats and call logs is done using the Custom Field Template setting in the Department settings on the Ticket, Live Chat or Call Logs tabs.

To view the details for a specific template, simply double-click the template. To create a new template, click Add in the content pane toolbar. The template details will load in a new window and the following settings will be available:

#### **Options tab**

Use this tab to display the following setting:

- Display Name - The name of the template.

#### **Field Definitions tab**

Use this tab to add existing field definitions to this template. When adding or editing field definitions to a template, the following options are available:

- Custom Field - The custom field to be added to the template.
- Display Name - The text displayed to customers and/or agents that describes the custom field.
- Visibility - To specify whether the field definition is available to users, agents or both, choose the appropriate option from the list.
- Required by Users - Checking this box will require users to complete this custom field.
- Required for Agents to save or send - Checking this box will require agents to complete this custom field before sending a ticket response.
- Required for Agents to close tickets - Checking this box will require agents to complete this custom field before closing a ticket.
- Show in communication view - Checking this box means that custom fields will appear in an agent's compose window when submitting tickets to SmarterTrack. Custom fields will appear once the agent has selected the group the ticket is submitted to or the group that is sending the ticket to the customer.

## **Time Log Categories**

While not directly related to custom fields as detailed above, time log categories add additional customization to the SmarterTrack management interface. Configured by the system administrator, time log categories are available on time logs to help managers see where an agent's time is spent or to organize tasks related to a specific project. To create a new category, simply click Add in the content pane toolbar. A Category modal window will display a field for the Category Name. Once created, time log categories are available to use immediately.