



Email

Help Documentation

Email

Administrators will use this section to specify the settings relating to email delivery, including POP importing, SMTP accounts, autoresponders, email templates and more.

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 Email . The email settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- **Default Encoding** - To specify the encoding format, select the appropriate option from the list.
- **Delete Failed Emails After** - The number of days after which undelivered emails are deleted. By default, failed emails are deleted after 30 days. Note: Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder.
- **Delete Raw Content After** - To specify the values at which raw content should be deleted, type the appropriate number in the fields for days, files, and MB.
- **Day(s)** - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.
- **File(s)** - The maximum number of files that will be kept before the files are purged from the system. By default, the maximum number of files is 25,000. Note: SmarterTools recommends keeping this option at the default setting or lower.
- **MB** - The maximum amount of space available for raw content storage. If this amount of space is exceeded, the files are purged from the system. By default, the maximum amount of space is 10,000 MB.
- **Delivery Delay** - To specify the number of seconds automated messages from the system are delayed, type the appropriate number in this field. Setting a delivery delay can keep the connection between your help desk and your mail server running smoothly. By default, the delivery delay is 10 seconds.
- **Autoresponder Blacklist** - Any email address or domain you add to this text box will be excluded from receiving any departmental auto-responders (e.g., ticket received notifications). Addresses/domains should be entered one per line.
- **Filter duplicate incoming emails** - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.
- **Remove redundant embedded replies in emails** - Checking this box will truncate emails by removing redundant embedded replies. For example, sometimes replies from users can contain

multiple copies of previous conversations between that user and the agent. Checking this box removes most, if not all, of that "redundant" content to keep replies shorter, less wieldy, and easier to read and follow.

SMTP

SmarterTrack does not utilize an internal SMTP server to send email messages. Therefore, an external SMTP account must be configured to send ticket responses and system notifications. Accounts configured in this section can be chosen in the Brand and Department settings. By default, a Default SMTP Account will be present. Edit the account or click Add in the content pane toolbar to configure the SMTP settings. A modal window will display the following options:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which messages are sent.
- Display Name - The name used to identify the mail server. This field is optional but recommended.
- Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
- Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
- SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
- SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.

POP

POP accounts can be used to import tickets from email. Note: If using a POP server for email, any messages in the account will be downloaded into SmarterTrack and deleted from the mail server. To add a POP account, click Add in the content pane toolbar. A modal window will display the following options:

- Server - The outgoing POP server name on which the email account resides.
- Encryption - Select the level of security used for receiving emails: None, SSL, or TLS.
- Server Port - The port used to connect to the POP server. By default, the POP server port is 110. Note: If SSL or TLS is used, this port will automatically change to the default port necessary to match the security setting.
- Login Username -The identifier used to log into the POP server.
- Login Password - The corresponding password used to log into the POP server.
- Email Address - The full email address associated with the POP account. Some mail servers offer the ability for the Username to be different than the actual email address, or don't allow the

full address as the Username. To ensure the proper account is used for POP importing, both the Username and Email Address need to be added when setting up a POP account.

- Import Frequency - The interval, in minutes, that SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.
- Department - The department that will utilize the POP settings for ticket importing.
- Able to Start Tickets - The role required to submit a ticket via email. For more information, see Roles .
- Leave Messages on Server - By default, when you retrieve email through POP3, the emails are deleted from the mail server. Checking this will cause email messages retrieved via POP to stay on the mail server.

Note: When importing emails, the department autoresponder will not be sent for emails more than 3 days old.

Templates

When certain actions occur within the system, SmarterTrack can send an email based on that action. For example, if a company wants to send a follow-up survey to a customer after a ticket resolution, the system will automatically send an email requesting the customer complete the survey. These system-generated emails are predefined and no new templates can be created. However, administrators can use this section to edit the template content. Each template is sent using the Brand SMTP settings. See below for more information on the available templates:

-Master Template-

This template is used to control the outer HTML appearance of emails sent from SmarterTrack. An HTML and Preview tab are available to edit the HTML and view what the HTML will render in outgoing emails. No variables are available for this template.

Auto-Close Ticket

This email is used when a department is set to automatically close tickets after a certain amount of time. The email notifies the customer that a particular ticket was closed, but that the ticket can be re-opened by simply replying to it. The following variables are available:

- Ticket Number - The ticket number assigned to the closed ticket. [%TICKETNUMBER%]
- Subject - The Subject of the closed ticket. [%SUBJECT%]
- Date - The date the ticket was closed. [%DATE%]
- Current Time - The time the ticket was automatically closed. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Community Activity Digest

This email is sent on a regular basis and is used to notify the customer of activity on Community threads they are subscribed to. The following variables are available:

- Activity Summary List - A summary list of all Community activity that the user is subscribed to [%COMMUNITYACTIVITYLIST%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Community Conversation Notification

This email is used to notify a customer that a message was sent to them from another Portal user. The following variables are available:

- Username - The username of the person sending the message. [%USERFROM%]
- Comment - The text/comment that was sent. [%MESSAGETEXT%]
- URL - A link to the user's profile. [%PROFILEURL%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Community Post Moved Notification

This email is used to notify a customer that a post they created was moved to a new Thread. The following variables are available:

- New Subject - The new post subject, if it was changed. [%NEWSUBJECT%]
- Subject - The post's original subject. [%OLDSUBJECT%]
- Post - The full text of the original post. [%POSTTEXT%]
- Username - The username of the person creating the post. [%USERNAME%]
- URL - A link to the user's profile. [%PROFILEURL%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Email Rejected Due to Lock

This template is used to notify a customer that the ticket they are replying to has been closed and locked and offers a way to initiate a new ticket. The following variables are available:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Ticket Number - The ticket number assigned to the rejected ticket. [%TICKETNUMBER%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Email Rejected Due to New Ticket Requirements

This template is used to notify a customer that they don't meet the department's required role for starting a ticket. For example, a billing department may require users to be Registered Users of SmarterTrack, but they are attempting to submit the ticket anonymously. For more information, see Roles . The following variables are available:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Email Rejected Due to Policy

This template is used to notify a customer that the department they're trying to contact does not accept tickets via email. This email will be sent when a POP account is not enabled for the department. Instead, tickets need to be created via the Web portal. For more information, see Email . The following variables are available:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Forgot Login

This template is used to send the password to the registered email account on file when a user forgets his/her login information and they click on the "Forgot Login?" link on the Web portal. The following variables are available:

- Base URL - The full URL to the portal. [%SITEURL%]
- Username - The username of the account requesting the password reset. [%USERNAME%]
- Password - The password of the account (required). [%PASSWORD%]
- Change Password URL - The URL the user clicks on that will allow them to reset their password. [%CHANGEPASSWORDURL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Survey

This template is used to offer a survey to a customer after their ticket is resolved. The following variable is available:

- Ticket Number - The ticket number the customer will use as a reference for the survey. [%TicketNumber%]
- Subject - The subject of the resolved ticket. [%Subject%]
- Survey Hyperlink - A link to the survey that the customer can click to go to the actual survey. [%SURVEYURL%]
- Survey HREF - The text link set up for the survey. This is then used in place of the Survey Hyperlink to provide a friendly text string to click versus a long URL. [%SURVEYHREF%]
- Customer Name - The customer's display name. [%CUSTOMERNAME%]
- Customer Username - The username of the customer. [%CUSTOMERUSERNAME%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Ticket List

This template is used when a customer requests an emailed list of all previous tickets. The following variable is available:

- All Tickets - All Tickets that belong to user. [%ICKETLIST%]
- Email Address - The email address associated to the tickets. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

Verify Email Address

This template is used to confirm a new user's email address. The following variables are available:

- Username - The username on the account, [%USERNAME%]
- Full Name - The full name for the user signing up, [%FullName%]
- Email Address - The email address on the account, [%EMAIL%]
- Link - The link they need to click on to verify the account (Required). [%LINK%]
- URL - The full URL that needs to be clicked. [%URL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]