



Installation

Help Documentation

Installing SmarterTrack

These requirements are not applicable to those using the Hosted SmarterTrack Helpdesk.

SmarterTrack comes as a single installation file that contains everything necessary to install the product and get it set up on your server, regardless of the Edition that you intend to use. The features available are based on the license used during the activation process; if no license is entered, the Free Version will be installed. The SmarterTrack installer can be downloaded from the SmarterTools website . Before you get started, however, make sure you have reviewed the System Requirements necessary for SmarterTrack to run.

Jump to:

- Installation on a Server
- Installation on a Shared Server
- Completely Uninstall SmarterTrack

Installation on a Server

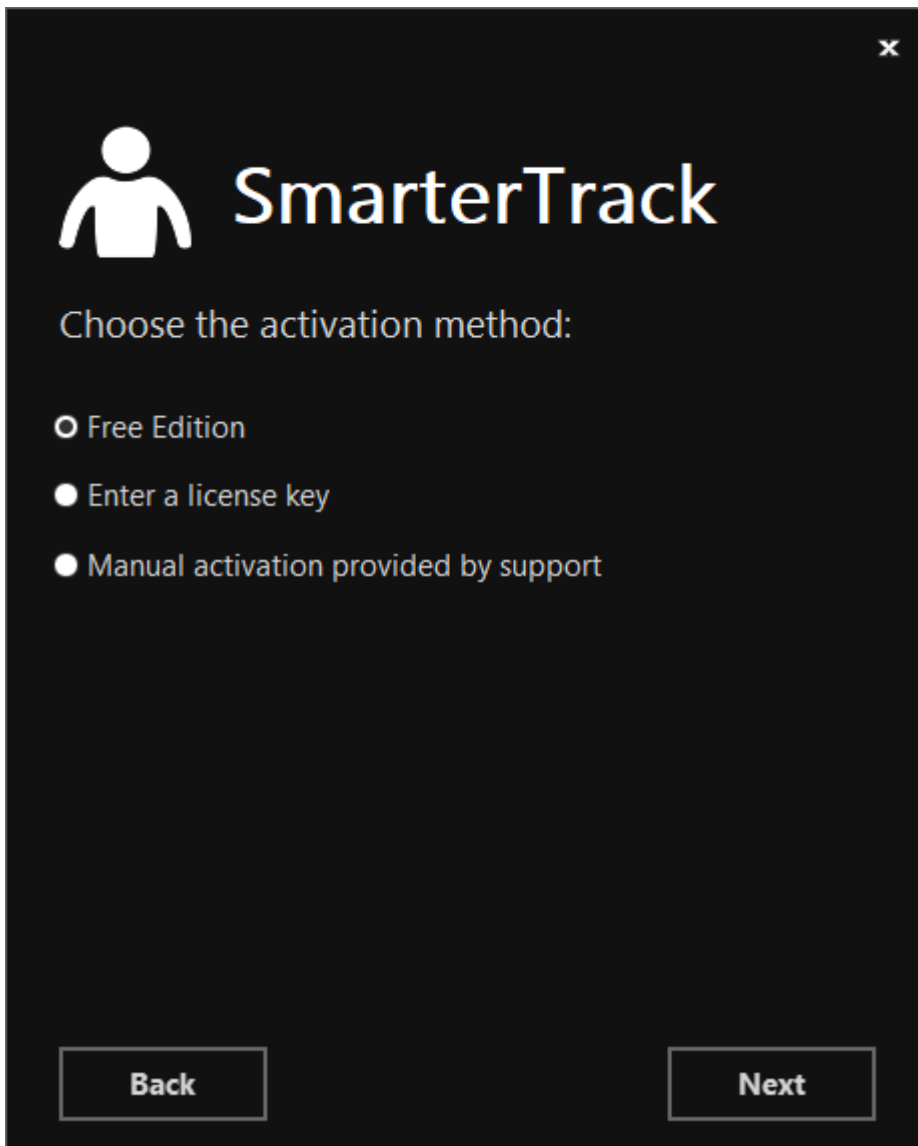
SmarterTrack starts by installing the overall application and application files. This is just like any standard program installation: you start the installation, select the path for the installation and then agree to the SmarterTrack license terms and conditions.

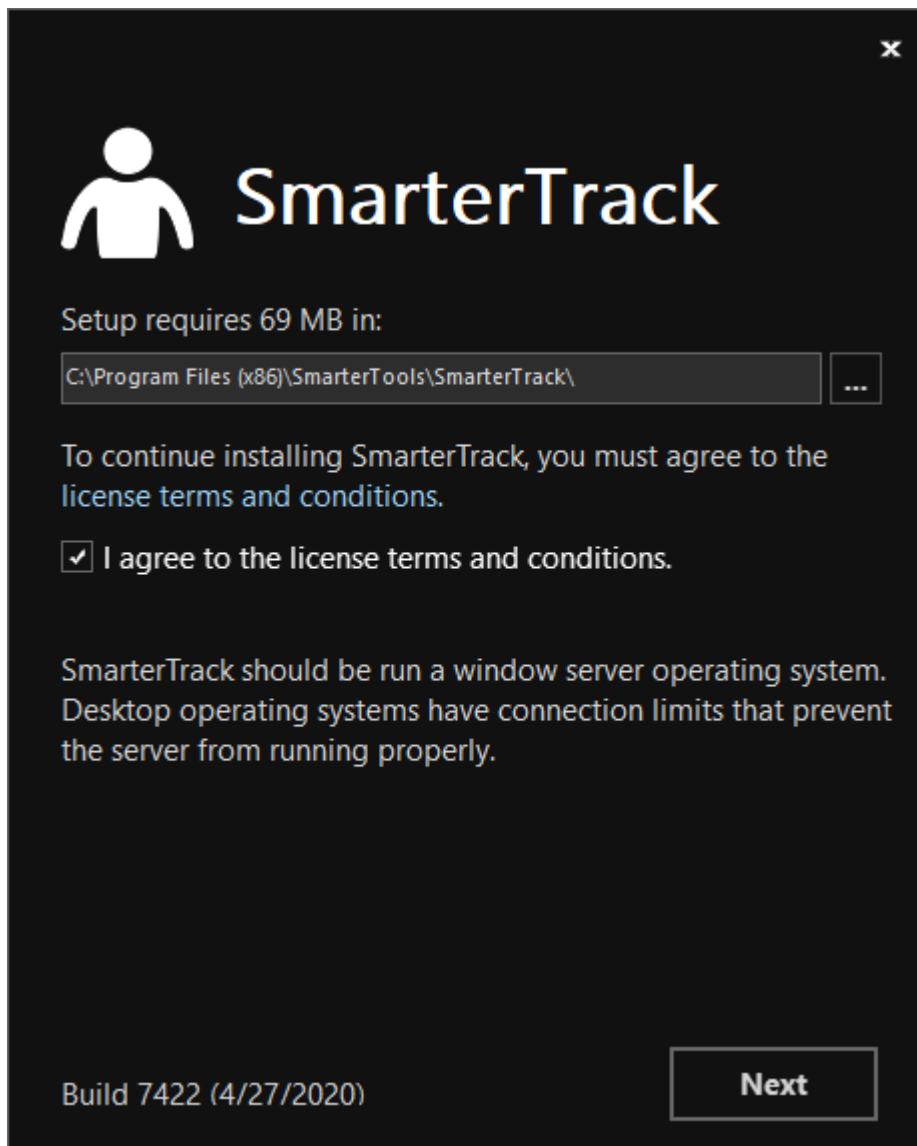
You'll be able to track the progress of the installation as SmarterTrack is configured on the server. Once the initial file installation occurs, the next step is walking through the IIS Configuration Tool. This installation process includes:


- Selecting your activation method. This includes whether you're installing the Free Edition, whether you have a license key or whether you've been given a manual activation from SmarterTools. Manual activations are used in circumstances where SmarterTrack will be used on an internal network that has no public access. • Next, you're presented with the default installation path and are asked to agree to the SmarterTools license terms and conditions. • Then, the installation process will verify that IIS is installed. If IIS isn't present, the installation will actually install IIS for you as it is a requirement for SmarterTrack.
- After the IIS check, a check is performed to see if a SmarterTrack site already exists on the server. If not, one can be created. If a site already exists, you can select that site and use it for your installation. Using an existing site is perfect for users who are simply upgrading their installation to the latest version. • If setting up a new site, you set the site name, set your hostname, select the IP(s) to use for the installation and the file path for the Management and Reporting Server (MRS). If using an existing site, these steps are bypassed; you're asked to select the site you wish to use for the installation. • After setting up your new site, SmarterTrack

will create an app pool using that site name, then set up as a site in IIS that uses the new app pool.

- Next, the necessary permissions are set for the site.
- Finally, the installation is verified. • Once everything is verified, the Getting Started Wizard opens using the server's default browser. (If a default browser is not set, you'll be offered options on which browser to use.)








SmarterTrack

Internet Information Services Configuration

- Create a new site
- Use an existing site
- Configure a site later

Back **Next**



SmarterTrack

Internet Information Services Configuration

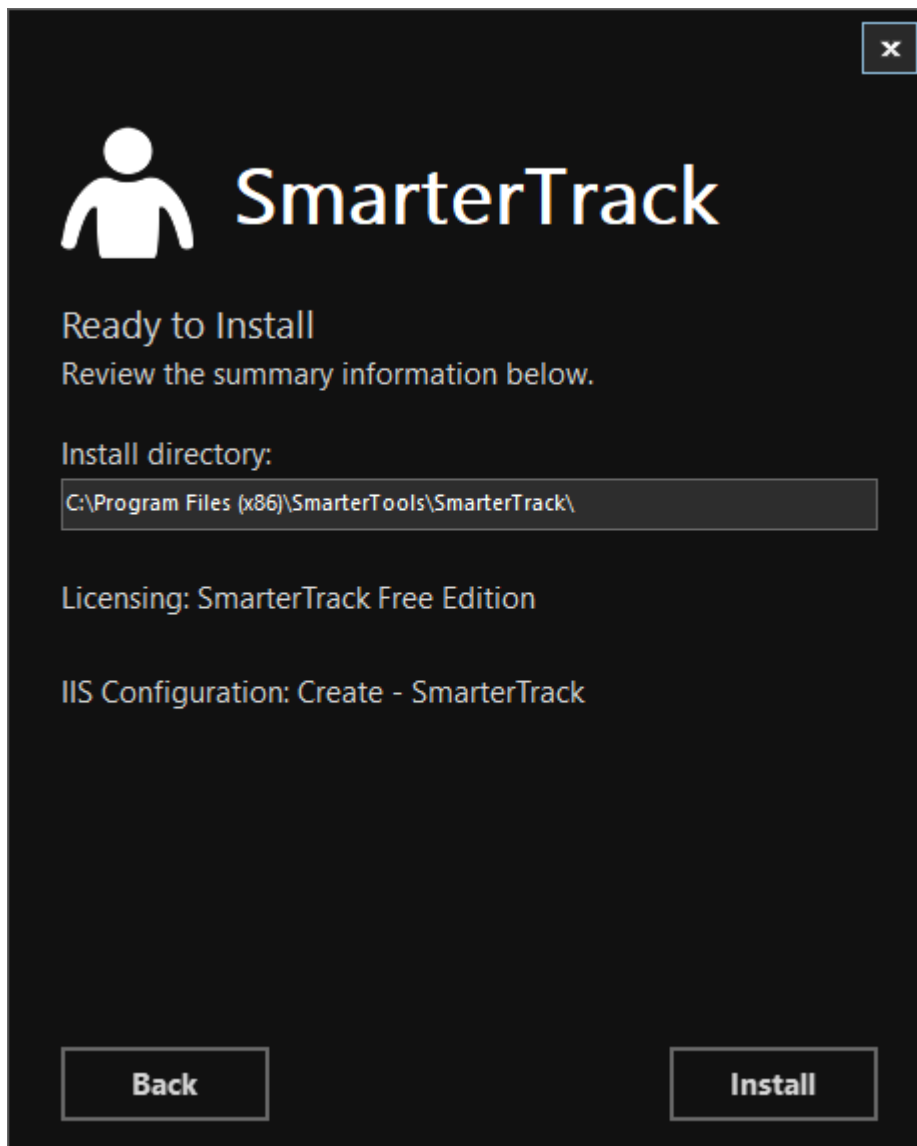
Site Name
SmarterTrack

Hostname

IP Address Port
* 9996

File Path
C:\Program Files (x86)\SmarterTools\SmarterTrack\MRS ...

Back **Next**

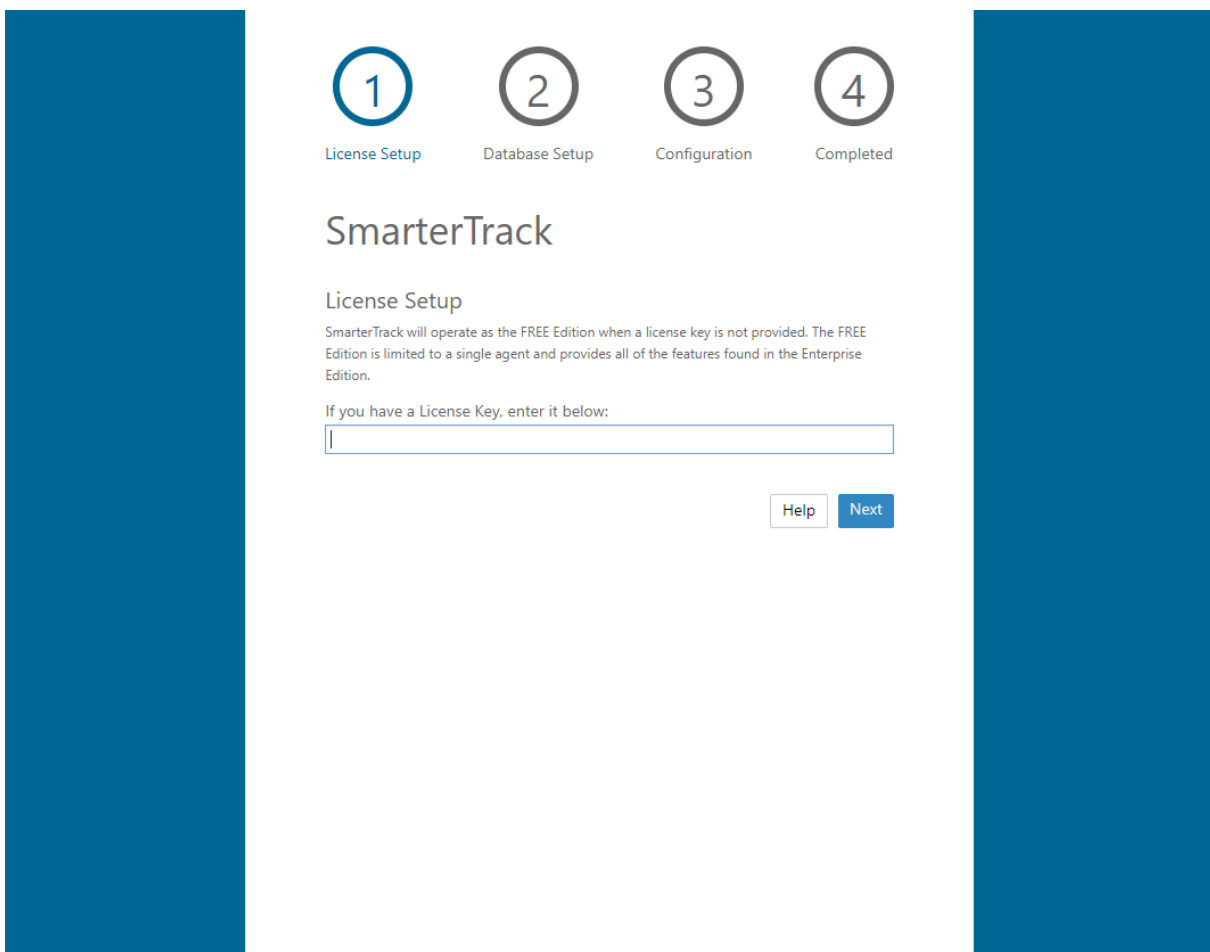


Getting Started Wizard

The Getting Started Wizard is a simple, yet complete, process to get SmarterTrack up and running on a server. Using it, you walk through the following pages:

- Enter your license key. The first page allows you to activate your license key. If you don't have a license key, you can simply hit Next and the Free Edition will be activated.
- Next, you set up or connect to a database. - As mentioned, SmarterTrack requires a database back end for storing tickets, live chats, KB articles and more. Therefore, part of the Getting Started process is telling SmarterTrack not just the type of database to use, but the database name as well. Regardless of which type of database you use, once your settings are input, and you hit the Next button, SmarterTrack will start running through the necessary SQL commands to start constructing the tables and relationships necessary for SmarterTrack to run.
- Next, you'll configure your installation. - After your database is set up, you'll then create your "Administrator / Employee", who will act as the Administrative account for your SmarterTrack

installation as well as your first Employee. (If you want this account to ONLY act as the Administrator for SmarterTrack, you can remove the Agent Role from the account AFTER you have created additional Agents.) You will also add information about your company, such as your company name, a company logo, etc. • Installation complete! - Finally, you're ready to use SmarterTrack. The last page of the Getting Started Wizard offers up 2 areas to move to next: the Management Interface or the Portal. Regardless of where you go, you'll already be logged in with the Administrator / Employee account you created earlier. First, the Management Interface is where you'll go to begin adding in your Departments and Groups as well as additional Agents, as needed. For information on these items, and how to set up SmarterTrack to fit your particular needs, see the Company Organization page to see how certain types of businesses can organize their installation. Going to the Portal, you'll see your logo, company name and other company information displayed, as well as your Employee's name in a drop down button. (Clicking that button will allow you to log into the Management Interface as well.) The Portal is where customers will go to submit tickets, start live chats, read knowledge base articles and more. It's the customer-facing part of SmarterTrack that your users will see.



The screenshot displays the SmarterTrack installation wizard interface. At the top, there are four numbered steps in circles: 1 (License Setup), 2 (Database Setup), 3 (Configuration), and 4 (Completed). Below these steps, the title "SmarterTrack" is prominently displayed. Underneath the title, the section "License Setup" is active. A paragraph explains that SmarterTrack will operate as the FREE Edition if no license key is provided, and that the FREE Edition is limited to a single agent. Below this text is a text input field for the license key, with the prompt "If you have a License Key, enter it below:". At the bottom right of the form area, there are two buttons: "Help" and "Next".

1 License Setup 2 Database Setup 3 Configuration 4 Completed

SmarterTrack

License Setup

SmarterTrack will operate as the FREE Edition when a license key is not provided. The FREE Edition is limited to a single agent and provides all of the features found in the Enterprise Edition.

If you have a License Key, enter it below:

Help Next



License Setup



Database Setup



Configuration



Completed

SmarterTrack

Database Connection

A database is required to use SmarterTrack.

SmarterTrack can use Microsoft SQL Server (Express, Web, Standard or Enterprise Editions), MySQL Server or a MySQL equivalent such as MariaDB. For more information on how to install a database or about the database requirement, click on Help.

Server Type

Microsoft SQL Server

Server Name

localhost\SqIExpress

Authentication

Integrated Authentication

Username

WORKGROUP\DESKTOP-J556QJCS

Database Name

SmarterTrack

Table Name Prefix

st_

Help

Next



License Setup



Database Setup



Configuration



Completed

SmarterTrack

Administrator / Employee

Create the SmarterTrack Administrator account, which also acts as your initial Employee.

Username

Display Name

New Password

Confirm Password

Company Information

Provide the information about your company as you would like it to be seen by your customers. This will be your default brand. All of these settings are optional and can be configured at a later time.

Company Name

Company Website

Time Zone

Company Logo

 No file chosen

Images larger than 500x90 pixels will be automatically resized.

0

License Setup

1

Database Setup

2

Configuration

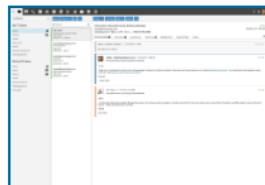
3

Completed

SmarterTrack

Your SmarterTrack site has been created! Click on a thumbnail to head to the Management Interface or Portal.

Management Interface



The **Management Interface** is where System Administrators log in to begin working with SmarterTrack. Administrators manage the SmarterTrack installation as a whole, whereas Employees manage tickets and live chats, create canned replies and knowledge base articles, view system reporting, and more.

<http://localhost:9996/Management/Root.aspx>

Portal



The **Portal** serves as the central hub for all user activity. Customers use the portal to submit tickets, initiate live chats, and view knowledge base articles and news items. It's also where Users and Employees exchange ideas, discuss issues, make announcements, and ask questions within the community.

<http://localhost:9996/Main/>

Installation to a Shared Server

Before installing SmarterTrack in a shared hosting environment, make sure your environment meets the following requirements:

- Support for ASP.NET 4.7+.
- Hosting company allows for Full Trust ASP.NET 4.7+ applications.
- Access to Microsoft SQL Server 2012+ or or MySQL 5.5 and higher.
- Server specifications meet the SmarterTrack System Requirements.

To install SmarterTrack in a shared hosting environment, you will need to complete the following steps:

- Download SmarterTrack files and upload them to your Web server.
- Verify file permissions.

- Set up your database.
- Complete the SmarterTrack Setup Wizard

Additional details regarding these installation steps are below.

Download SmarterTrack Files and Upload Them to Your Web Server

Follow these steps to complete the first phase of the installation process:

- Download the Manual Installer for SmarterTrack (MSI) from the SmarterTrack Download page.
- Then unzip the file to your computer's hard drive.
- Upload the extracted files to your Web server. If you are uploading these files to a subfolder (such as /SmarterTrack), make sure that this folder is an application starting point. NOTE: For more information on application starting points, please contact your hosting company.

Verify File Permissions

Make sure you set the following file permissions to complete the second phase of the installation process:

- The SmarterTrack/App_Data folder will require read, write, delete, and modify permissions to itself and all subfolders and files.
- The /SmarterTrack/Services folder will require the Execute Scripts permission.

NOTE: If you do not have the ability to change these permissions or if you have questions regarding these permissions, contact your hosting company for assistance.

Set Up Your Database

SmarterTrack requires the user of either Microsoft SQL or MySQL for its back end storage of ticket data, live chat data, etc. Therefore, prior to running the MSI you'll need to have a database set up on one of those 2 platforms.

Complete the SmarterTrack Setup Wizard

To set up SmarterTrack for the first time, you will be using the SmarterTrack Setup Wizard. Use a Web browser to navigate to the SmarterTrack URL and log in using the default system administrator (default login is "admin" for both username and password). The Setup Wizard will walk you through the connection and initialization of the database, the activation of the product, initial department and agent creation, and default SMTP configuration. Once these steps are completed, SmarterTrack will be installed and ready for use.

Completely Uninstall SmarterTrack

On occasion, a System Administrator may need to completely uninstall SmarterTrack. For example, if your help desk moves from an old server to a new one, the System Administrator may want to clean up the old server and re-purpose it for another use.

Follow these steps to completely uninstall SmarterTrack:

- Uninstall SmarterTrack using the Add/Remove Programs feature of Windows
- Delete the SmarterTrack software folder. By default, this folder is located at C:\Program Files (x86)\SmarterTools\. NOTE: If SmarterTrack is the only SmarterTools product installed on the server, the entire "SmarterTools" folder can be deleted.
- Delete the SmarterTrack website and application pool from within IIS.
- Finally, if SmarterTrack is no longer being used, it's possible to delete the database or schema associated with it. How you do this depends on the database being used: Microsoft SQL versus MySQL. However, if you're going to continue using SmarterTrack, but on a different server, the database should not be deleted.

All components of SmarterTrack have been removed from the server.