Manage

Help Documentation

Manage

Brands

A brand is the top level of the SmarterTrack help desk. For smaller companies, the brand is just another name for the company itself so there may only be one brand in SmarterTrack. However, companies with different divisions may want to use SmarterTrack to manage all company communications, separately, for all divisions. In addition, some companies have different brands that specialize in specific products and/or clientele. SmarterTrack can accommodate all of these scenarios by allowing companies to set up separate brands without having to install multiple different instances of SmarterTrack.

The TRUE benefit of Brands, however, is in Employee management. Utilizing a multi-Brand configuration in SmarterTrack allows a company or business to support all of their Brands using a single Agent base. That means that a single Agent can handle sales or support (or billing...or customer service...) requests from multiple Brands at the same time. This allows a company to maximize their coverage while minimizing the need to hire Agents specific to one Brand. Agents can work with customers in each brand separately, and customers of each brand have access to customized and brand-specific web portals.

Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface, as well as department and group creation. That means that each brand can have its own set of departments and groups, and agents within those brand-specific departments and groups.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Brands . Any brands associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple brands. Brands must be selected before choosing an action from the toolbar.
- Brand Name - The name of the brand.
- Host Header - The host header to which a brand is assigned.

The following options are available from the content pane toolbar:

- New - Creates a new brand.
- Edit - Allows the administrator to make changes to a brand's settings.
- Delete - Permanently deletes the selected brand(s).

To add a new brand, click New in the content pane toolbar. A modal window will display fields for the Brand Name and Host Header. Once saved, the additional brand settings will appear in the content pane. To view the settings for a specific brand, simply double-click the brand. The brand settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Brand Name - The name of the brand. This can be a company name, a product name, etc.
- Company Website - The URL to the primary website for the brand.
- Host Headers - Host headers allow a Web server to host more than one website domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For those using self-installed SmarterTrack, please see the KB article Create Host Headers for Use with Brands . For those using the hosted SmarterTrack helpdesk, please see Point Your Own Domain Name at your Hosted SmarterTrack Helpdesk . Note: Host headers cannot be edited after the brand is created.
- Default Font - The font family that will be used by default for items created within or for the brand, such as ticket messages, canned replies, knowledge base articles, etc.
- SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for brand-level notifications (e.g., any one of the email templates). Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Brand, click Add SMTP Account . A modal window will display the following options:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which brand 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.
- Google Analytics Site ID - The unique identifier used to track your site in Google Analytics.
- Company Favicon - A favicon is an icon that is associated with a URL and displayed in a

browser’s address bar or next to the site name in a bookmark list. Upload a custom favicon for the brand by clicking on Choose File. Then browse for the ICO file. (Favicons must be uploaded in .ico format. Recommended sizes for a favicon are 32x32, 64x64 or 128x128 pixels.) Click Save then navigate to the brand's Portal or refresh the Portal site to see the new favicon. (In some browsers, refreshing the Portal 2-3 times may be required before the browser will pull in the new favicon data.) Note: If multiple brands are configured, the favicon of the Default Brand will be displayed when viewing the Management Interface.

• Company Logo - The logo to use for the brand. Click on Choose File to upload an image.

• Display logo on portal - Checking this box will display the company logo on the Home page of the Portal.

Permissions

Use this tab to edit the following permissions for your brand:

• View Community - From the dropdown, select the role necessary for portal visitors to view, and reply to, various threads in the community. Note: This selection also determines which users can privately message other users at the Portal. Community messaging is enabled for any registered user with permission to view and participate in Community threads.

• Create Community Threads - From the dropdown, select the role necessary for portal visitors to start new threads in the community.

• View Ticket Requires - From the dropdown, select the role necessary for portal visitors to view tickets in the portal.

• New feedback starts out moderated - Checking this box means that any new feedback left on a knowledge base article will first have to be reviewed and approved by a portal administrator before it is viewable by users. By default, this option is checked.

• Users can change display name - Checking this box will allow users to change their display name. By default, this setting is enabled.

• Users can change email address - Checking this box will allow users to change their email address on file. By default, this setting is enabled.

• Users can change password - Checking this box will allow users to change their login password. By default, this setting is enabled.

• Users can change profile information - Checking this box will allow users to change their profile information on file. Profile information includes phone numbers, address, time zone and preferred language. By default, this setting is enabled.

• Users can upload custom avatars - Checking this will allow users to upload their own, custom avatars for display in the portal, such as in the Community.

• Require approval for custom avatars - Checking this means that any custom avatar use will first need to be approved by portal administrators before they are displayed in the portal.

Portal Options

Use this tab to edit the following options for your brand's portal:

- Chat Link Style - Use this dropdown to select the live chat link to be displayed on the portal. Any live chat link configured in the Configuration | Live Chat settings will be displayed here.
- Display live chat in portal - Checking this box will display a link to initiate a live chat on the portal. By default, this setting is enabled.
- Display social network links - Checking this box will display social network links in the portal that will allow knowledge base articles and news items to be shared. By default, this setting is enabled.
- Display option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.
- Enable login form - Checking this box will allow users to login from the portal. By default, this setting is enabled. Note: If this setting is disabled, agents and administrators can only log in through the /login.aspx site.
- Enable new user registration - Checking this box will allow visitors to register for an account from the portal. By default, this setting is enabled.
- Enable Gravatar support for automatic avatars - Gravatar is a service that allows users to maintain a consistent online presence across multiple different properties. It's a simple and efficient way to use the same avatar on multiple websites. Checking this box allows users to use their Gravatar images versus uploading a custom image.
- Enable Knowledge Base voting in portal - Checking this box will display helpfulness voting options on knowledge base articles in the portal for both end users and agents.
- Ticket and Chat Privacy Policy URL - By adding in a full URL to this line, then enabling the setting, a required field is added to all ticket and live chat templates that are used. For tickets, the field appears when tickets are submitted via the Portal, and for live chats, the required field appears BOTH on the live chat template used on the Portal as well as the live chat template that appears when live chat is being used on a website, regardless of the type of live chat link that's selected. This filed is required to be checked before a ticket or live chat is actually submitted.
- Privacy, Cookie and Terms of Service Notification - When text is added to this field, the text is displayed as a modal window in the lower, left corner of the Portal and it will have an associated "Accept" button. Both the style of the modal background and the button are controlled using the Cookie Modal Primary and Cookie Modal Secondary color selectors. This setting is used for displaying a Brand's cookie policy or even text relating to Terms of Service, an acceptable use policy or other items. It's an informational modal that requires the user to actually perform an action, proving they've seen the notification and accept its contents. By default, the text area is left blank.

• Primary Color - This is the color for the main menu buttons on the portal (Home, Knowledge Base, News, etc.) and the titles of the news items on the News page. The default is #055E8A.
• Secondary Color - This is the title color of the Recent News items listed on the home page of the portal. Generally, this color will be applied to the text within the dark grey sections of the portal. The default is #222222.
• Primary Button Color - The standard button color for buttons such as Start Ticket, Submit Thread and the icons on used for the Knowledge Base, Community, Tickets, etc. The default is #3A87AD.
• Secondary Button Color - The color for secondar buttons such as Search buttons. The default is #666666.
• Button Text Color - The color for text that appears in both primary and secondary buttons. The default is #FFFFFF.
• Content Background Color - The default color for the main content areas of the portal. The default is #FFFFFF.
• Navigation Bar Color - The color of the top bar of the portal, where the User, Alerts and language selection buttons reside. The default is #545454.
• Cookie Modal Primary Color - The color for the background of the cookie policy modal AND the button text color. The default is #237AFC.
• Cookie Modal Secondary Color - The color for the text of the cookie modal AND the button color. The default is #FFFFFF.
• Text Color - The color for the majority of text as it appears in the portal and on the community. This includes KB text, community posts, etc. The default is #333333.
• Link Color - This is the color for any hyperlinks on the portal, including those used to view knowledge base articles, links to view tickets and threads and any links within the KB articles or Community threads. The default is #0088CC.
• Custom CSS Style Overrides - SmarterTrack allows administrators to stylize their brand portals with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them. To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can create a version of that style yourself and then paste it in this box to override the default. Realize this will happen wherever that style is used, so changing one style can affect the portal in multiple areas. To revert back to the default style, simply remove your custom style from here and save your changes.

Custom Links

In order to create a sense of community with end users, companies may want to expand their Web portals and use them as hubs for disseminating news and information. One way to do this is to add custom links on their portal to other websites and resources. For example, link to a blog, to a community forum, to a management interface and more. When adding custom links, administrators define the custom link title that is placed on the Portal and that links to a specific URL. Custom Links are different than external feeds in that External Feeds will actually extract snippets from the feed listed and display that text as a section on home page of the portal, whereas Custom Links create new text that is displayed under the main portal buttons and that links directly to the link URL provided.

To create a new custom link, click Add in the in the content pane toolbar. A modal window will display the following options:

- Brand - Use this dropdown to specify the brand for which the link will display.
- Title - The link name displayed in the portal.
- Link URL - The URL to the linked website.
- Link Target - To specify how the linked site will open, select the appropriate option from the list.
- Role Required - To specify which users have access to the link, select the appropriate role from the list. For more information, see Roles .

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

Holidays

Use this tab to specify company holidays. To add a holiday, click Add in the content pane toolbar.
Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the portal.

• Department Selection Message for Live Chats - The text that displays in the live chat submission form instructing customers to select the department they want to interact with.
• Department Selection Message for Tickets - The text that displays in the portal that instructs the user to select a department when submitting a new ticket. Administrators can add any custom text as well, specifying any ticket requirements, etc.
• Main Portal Announcement - The text that displays on the portal home page. Some companies may choose to write a welcome message or a description of the types of services customers might find on the self-service portal. Others may want to add graphics, banner ads or more to completely brand and customize how the portal looks for visitors. The Main Portal Announcement offers a complete WYSIWYG editor that allows all manner of customization. Regardless of what's added, the announcement will appear at the very top of the main content area of the portal.
• Additional Footer for Portal - The text that displays at the top of the portal footer above the SmarterTools copyright information.

Community Categories

SmarterTrack's Community is a centralized location brands can use to communicate with customers and end users, which is a key for any business. Categories are used to separate threads within the Community and can be things like key words, product names and more. Using the Add button in the content pane toolbar, add Categories that appear as options for any new Community threads. Community Categories can be made visible to everyone or to a select role. For more information, see Roles .

Departments

A department is the second level of the SmarterTrack organizational structure. Each brand will be broken down into departments. For example, a brand may have Sales, Support and Human Resources departments. Typically, each department will have its own email address, such as support@example.com or sales@example.com. This section lists all of the departments that are currently available to your organization and provides administrators with the ability to add new departments or edit/delete existing departments.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Departments . Any departments associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The name of the department. For example, Sales, Support, Billing, etc.
- Email Importing - The POP email address being used to import tickets into SmarterTrack for the department. If a dash is present for a department, then POP importing is not configured for that department.
- Agents - The number of agents assigned to the department.
- Active Tickets - The number of active tickets within the department.
- Active Live Chats - The number of active live chats within the department.

The following options are available from the content pane toolbar:

- New - Creates a new department.
- Edit - Allows the administrator to make changes to a department's settings.
- Clone - Rather than creating a department from scratch, administrators can clone an existing department and modify settings for the new department as needed.
- Delete - Permanently deletes the selected department(s).

To view the settings for a specific department, simply double-click the department. Alternatively, you can select a department and click the Edit button in the content pane toolbar. The department settings will load in the content pane and the following tabs will be available:

Options

- Brand - The brand to associate to the department.
- Department Name - The name of the department.
- Front Line Group - The default group that gets assigned tickets and live chats. A department can only have one front line group.
- SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for outgoing tickets and department-level communications. Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Department, click Add SMTP Account . A modal window will display and the following options will be available:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which department 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.
• Preferred Language - The default language for the department.
• Allow all agents to see the contents of this department - Frequently, agents may need to access tickets in a department that they don't belong to in order to respond to customer inquiries. Enable this setting to mark a department as having their ticket contents visible to all agents. Agents can then find those items and see them in a read-only manner, when searching. Managers are allowed to modify any item found this way, while agents are allowed to add comments only.

Tickets

• New Tickets in Portal - The role required to submit a ticket via the portal. For more information, see Roles .
• Custom Field Template - The custom field template used when submitting tickets from the portal. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Custom Fields .
• Survey After Ticket Closed - To automatically offer a survey to customers after a ticket status has been changed to "closed" or "closed and locked", select the appropriate survey from the list. For more information, see Surveys .
• Auto-Close After - The number of hours after which a ticket assigned to the department and marked as "waiting" will automatically close. The default setting is 168 hours.
• Auto-Lock After - The number of hours after which tickets assigned to the department and marked as "closed" will automatically lock. (Locked tickets do not automatically reopen when a customer sends a reply.) The default setting is 322 hours.
• Auto-Delete After - The number of days after which tickets assigned to the department with a "closed" or "closed and locked" status will automatically be deleted. The default setting is 365 days.
• Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before they are able to close it.
• Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.
• Send notification to customer when tickets are auto-closed - Checking this box sends an email

notification to the customer when a ticket is auto-closed. For more information, see Templates section of Email .

Call Logs

- Custom Field Template - The custom field template used to create a call log. The call log template specifies which fields the agent should complete when logging a call. For more information, see Custom Fields .
- Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. A department's business hours can be inherited from the brand or configured separately. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

Holidays

Use this tab to specify company holidays. A department's holidays can be inherited from the brand or configured separately. To add a holiday, click Add in the content pane toolbar.

Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the portal.

- Before Ticket Submission - The text that is displayed at the top of the ticket submission form in the Web portal.
- After Ticket Submission - The text that is displayed after a ticket is successfully submitted from the Web portal.

Groups

Groups are the last level in the SmarterTrack structure. Each department is broken down into divisions called groups. For example, a support department may have Level 1 Support (less experienced support agents), Level 2 Support (more experienced support agents), and Support Management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying levels of access to information. This section lists all of the groups that are currently available to your organization and provides administrators with the ability to add new groups and/or edit/delete existing groups.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Groups . Any groups associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The department to which the group belongs.
- Group Name - The name of the group.
- Round Robin - A True/False indication of whether tickets are distributed automatically via round robin distribution. If False, tickets will need to be manually taken from the queue. For an explanation of the two distribution methods, see Ticket Distribution Methods .
- Agents - The number of agents assigned to the group.
- Active Tickets - The number of active tickets within the group.
- Active Live Chats - The number of active live chats within the group.

The following options are available in the content pane toolbar:

- New - Creates a new group.
- Edit - Allows the administrator to make changes to a group's settings.
- Delete - Permanently deletes the selected group(s).

To view the settings for a specific group, simply double-click the group. Alternatively, you can select a group and click the Edit button. The group settings will load in the content pane and the following tabs will be available:

Options

- Department - The department to which the group belongs.
- Group Name - The name givent to the group.

Agents

This tab gives administrators the ability to add, edit, and delete agents from the group. To view or change the settings for a specific employee within the group, simply double-click the employee and the agent-group relationship settings will load in the content pane. To add a new agent to the group, click Add in the content pane toolbar. The following options will be available:

• Agent - The name of the employee that is being configured.
• Round Robin - Select the method of ticket distribution for this agent. If round robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Round robin options include:

• Not Included (Pull from Queue) - By selecting this option, the agent will not receive tickets automatically for the group via round robin. The agent will still be a member of the group, so they will be able to see tickets for the group, receive transfers, cherry pick tickets, etc. but they will not receive any tickets automatically. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
• Primary Group - Agents in the primary assignment group will be the first to receive tickets via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive round robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.
• Max Tickets - The maximum number of new, active tickets an agent can have at a time for this group. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.
• Auto-Logout - Enter the number of minutes after which an inactive agent is automatically logged out of the SmarterTrack system.
• Enable live chat - Checking this box will allow the agent to receive live chats for this group.
• Hand-off on auto-logout - Checking this box will automatically hand off any of an agent's active tickets to another agent if the agent is automatically logged out due to inactivity.
• Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set their active groups.

Time Estimates

This tab gives administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports. For a very basic example, knowing that an agent will take an average of 10 minutes working on a new ticket tells you that an agent should be able to get through 6 tickets an hour. In an 8 hour shift, that means 48 tickets total. When coupled with agent cost, that number tells you what your support costs would be for that agent for that number of tickets. Managers and business owners can then use that information when making decisions on the types of support to offer (live chat, tickets or both), whether to offer paid or free support, whether to increase costs of goods and/or services to account for support costs, etc. In addition, these estimates can be used to project when a department and/or group is at the point where another agent or two is required in order to handle the workload.

- Ticket Created - The estimated number of minutes agents will spend creating a new ticket.
- Ticket Transferred - The estimated number of minutes agents will work on a ticket that has been transferred to them.
- Ticket Message In - The estimated number of minutes agents will spend working on a new ticket message.
- Ticket Message Out - The estimated number of minutes agents will spend researching and replying to a ticket message.
- Live Chat Started - The estimated number of minutes agents will spend starting a live chat.
- Live Chat Transferred - The estimated number of minutes agents will chat with a customer that has been transferred to them.
- Live Chat Incoming Message - The estimated number of minutes agents will spend responding to a live chat message.
- Live Chat Outgoing Message - The estimated number of minutes agents will spend composing a live chat message.

Employees

Just as the name implies, Employees, also known as agents, are employees of a company that are placed in various groups within departments to handle customer issues and requests using SmarterTrack. Employees are the ones that will manage tickets, live chats, tasks, write knowledge base articles and more.

To add new employees or edit existing employee settings, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Employees . Any employees associated to your company will load in the content pane.

By default, the following details can be found in list of the employees in the content pane:

- Display Name - The display name of the employee.
- Email Address - The employee's email address.
- Verified Email - A yes/no indication of whether the employee’s email address has been verified.
- Role - Indicates the highest-level role that the agent has assigned to their account. For example, if an account is marked as both an Agent and a Manager, the Manager role will be

displayed here. If the account is marked as an Administrator, the Administrator role will be displayed. Custom roles that might be applied can be viewed on the Roles tab of that employee configuration. For more information, see Roles .
• Last Login - The date and time in which the employee last logged into SmarterTrack.

The following options are available from the actions toolbar:

• New - Creates a new employee.
• Delete - Permanently deletes the selected employee(s).
• Sorting - Sorts the list of employees based on user, email, last login, verfied status or role.
• Refresh - Refreshes the content pane to show the most updated data.
• Clone - Rather than creating a new employee from scratch, administrators can clone an existing employee and modify settings as needed.

To view the settings for a specific employee, simply click the desired employee from the list or double-click on their entry to pop out the configuration window. To add a new employee, click New in the content pane toolbar. The employee settings will load in the content pane and the following tabs will be available:

Options

Use this tab to configure the profile information of the employee:

• Username - The username used to log into SmarterTrack.
• Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow employees to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
• Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
• New Password - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
• Confirm Password - When using password authentication, this allows administrators to verify the new password by re-typing it in this field.
• Email Address - The employee's email address.
• Display Name - The friendly name used to identify the employee within the SmarterTrack system.
• Display Name for Chat - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact

with customers via live chat.
• Time Zone - To specify the time zone, select the appropriate time zone from the list.
• Preferred Language - The language the Web interface should be shown in to this employee. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.
• Hourly Cost for Reporting - The hourly cost for the employee to work with tickets and live chats. This field is used for cost analysis reporting and is set to 10.00 by default.

Contact Info

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator. Up to 4 different phone numbers can be added for any given agent. The employee's website and home address can be entered here as well.

• Website - If the employee has a website, it can be entered here.
• Home Phone - The employee’s home phone number.
• Cell Phone - The employee’s cell phone number.
• Work Phone - The employee’s work phone number.
• Other Phone - The employee’s alternate phone number.
• Address - The physical address of the employee.

Portal Settings

• Portal Signature - Use this field to create a signature that will be displayed in the Portal, such as in Community threads and replies.
• Avatar Provider - SmarterTrack allows agents to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.
• Avatar - The display picture as provided by the Avatar Provider or one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.
• Avatar approved - Checking this box makes any uploaded custom avatar image appear on live chats, in ticket signatures, in community posts, etc. For agents who specify the use of an avatar provider (e.g., Gravatar), this box is not required in order for the avatar to appear.
• Subscribe to community posts automatically - Checking this box allows the employee to automatically subscribe to Community threads that they create or post in.
• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads employees are subscribed to that have had a new reply or the status or type changed.
• Email comments of community posts in which I participate - Checking this box allows

notification emails when a comment has been added to a Community thread reply that the employee participated in.
• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.
• Community Messaging Enabled - Checking this box allows the employee to have private conversations among users and agents in the Community.

Roles

This tab displays the roles assigned to the employee. An employee's permissions are defined by the roles to which he/she is assigned. For more information on roles, see Roles .

Groups

This tab gives administrators the ability to add, edit and delete the employee from a list of configured groups. To view or change an employee’s settings for a specific group, simply double-click the desired row and the agent-group relationship settings will load in the content pane. The following options will be available:

• Agent - The name of the employee that is being configured.
• Group - The name of the group that is being modified.
• Agent is a member of this group - Indicator of whether the employee is part of the group. To add an employee to a group, simply check this box and the remaining agent-group relationship settings will load in the modal window. To remove an employee from a group, uncheck this option and save.
• Round Robin - Select the method of ticket distribution for this agent. If round robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Round robin options include:

• Not Included (Pull from Queue) - By selecting this option, the agent will not receive tickets automatically for the group via round robin. The agent will still be a member of the group, so they will be able to see tickets for the group, receive transfers, cherry pick tickets, etc. but they will not receive any tickets automatically. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
• Primary Group - Agents in the primary assignment group will be the first to receive tickets via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive round robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this

group can include agents-in-training, part-time agents or others.
• Max Tickets - The maximum number of new, active tickets an agent can have at a time for this group. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.
• Auto-Logout - Enter the number of minutes after which an inactive agent is automatically logged out of the SmarterTrack system.
• Enable live chat - Checking this box will allow the agent to receive live chats for this group.
• Hand-off on auto-logout - Checking this box will automatically hand off any of an agent's active tickets to another agent if the agent is automatically logged out due to inactivity.
• Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set their active groups.

Custom Fields

This tab displays the available custom fields for agent preferences. For more information on custom fields, see Custom Fields .

Tickets

Use this tab to edit the following settings regarding the handling of tickets.

• Copy To Address - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.
• Other Reply From Address(es) - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.
• Max Tickets - The maximum number of new, active tickets an agent can have at a time. This field applies to the overall tickets an employee has and is not specific to any groups. Group Max Tickets may still be applied; however, the overall Max Tickets value will override. For example, if the overall Max Tickets is set at 10 and a group's Max Tickets is set at 15, the employee will

only be automatically assigned 10 tickets. When configuring this field, take into account the number of groups an agent is part of and the sum number of max tickets they should generally receive from those groups. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.

Live Chat

Use this tab to edit the following settings regarding the handling of live chats:

• Max Active Live Chats - To change the number of live chats that can be participated in at a time, type the appropriate number in this field. By default, this option is set to 1.
• Pop-up new chats automatically - Checking this box will display new live chats in a popup window. By default, this option is enabled.
• Play chat sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
• Play sound when a chat is queued - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
• Block live chats while composing call logs - Checking this box will block live chats from popping up while an active agent is composing a call log.

Roles

Every SmarterTrack user (here, the term "user" denotes anyone using SmarterTrack, from an end user to an administrator) is assigned a role, which defines permissions and dictates which features the user has access to. In addition, a user's ability to work within SmarterTrack is dictated by the combination of roles that are assigned to the user. Thererore, if a custom role is created, the permissions assigned to all roles for the user may need to be modified to ensure that the custom role's permissions are actually enforced. This is especially true of the Everyone and Agent roles because the Everyone role applies to everyone that interacts with SmarterTrack, both agents and end users, and because the Agent role is necessary for any employee that is going to interact with end users and customers. By default, SmarterTrack has six predefined roles:

• Everyone - Typically a customer or portal visitor. The Everyone role can view and search Knowledge Base articles, rate KB articles and view news items. The Everyone role is assigned to every user within SmarterTrack and cannot be removed.
• Agent - Typically, an employee that has access to the management interface and that will interact with customers and end users. An agent is able to view and respond to their own tickets

and live chats; create their own call logs and follow-up tasks; manage knowledge base articles, news items, and canned replies; use agent chat rooms and agent instant messenger; and view Who's On. It's worth noting that employees with the Agent role can only interact with their own items - they do not have access to other agent's tickets, live chats, etc. In addition, agents are only able to receive tickets for groups that they are members of.
• Manager - Generally an employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view all tickets and live chats, for all agents, for the groups that the manager participates in as well as for any departments those groups are associated with. Just as with an agent, a manager must be a part of a group before they can view all tickets and live chats for all other agents in that group. Note: Managers must also have the agent role enabled.
• Administrator - An administrator that has access to the system settings, management interface and database information. Typically, an administrator can also manage departments, groups, and users. Note: For new installations, the administrator must also have the agent role enabled. For those upgrading from a previous version, the administrator will not have the agent role enabled and can only access the reports and settings areas of the management interface. Administrators must have the Agent role and be part of groups in order to view global tickets and live chats.
• Registered User - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items.
• Registered User with Verified Email - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Roles . The default and custom roles associated to your company will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple roles. Roles must be selected before choosing an action from the actions toolbar.
• Role - The name of the role.
• Role Type - Indicates whether the role relates to company employees or users (customers).
• Users - The number of SmarterTrack users assigned to the role.
• Custom Role - Indicates whether the role is one of the seven predefined roles or if it was created by the administrator to meet specific company needs.

The following options are available from the content pane toolbar:

- New - Creates a new role.
- Edit - Allows the administrator to make changes to a role's permissions.
- Delete - Permanently deletes the selected role(s).

To view the permissions for a specific role, simply double-click the role. The role settings will load in the content window and the following tabs will be available:

Options

Use this tab to specify permissions for the role. The items shown will vary based on whether the role is available for Users or Employees.

- Role Name - The name of the role.
- Role Type - To specify whether the role relates to company employees or end users, select the appropriate option from the list.
- KB Articles - To specify whether users assigned to this role can create, modify, or read Knowledge Base articles, select the appropriate option from the list.
- KB Comments - To specify whether users assigned to this role can create, modify, reply, delete or moderate knowledge base comments, select the appropriate option from the list.
- News - To specify whether users assigned to this role can create, modify, or read news items, select the appropriate option from the list.
- Tickets - To specify whether users assigned to this role can create or reply to Tickets, select the appropriate option from the list.
- Tasks - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Call Logs - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Who's On - To specify whether users assigned to this role can view Who's On visitors, select the appropriate option from the list.
- Reports - To specify whether users assigned to this role can create reports, select the appropriate option from the list.
- Distribution - To specify how much control an employee has over the distribution of his/her workload, select the appropriate option from the list.
- Events - To specify whether users assigned to this role can configure events, select the appropriate option from this list.
- Survey - To specify how much control an employee has over the ability to view survey details, select the appropriate option from this list.

- Community - To specify how much control an employee has over the management, moderation and interaction with the Community, select the appropriate option from this list.
- Users/Organizations - To specify how much control an employee has over the creation and management of users and organizations, select the appropriate option from this list.

KB Articles

Use this tab to specify knowledge base permissions for this role. Note: This tab is only available if the administrator selects custom KB article permissions in the options tab. Knowledge base permissions cover the role's ability to:

- Create articles
- Modify articles
- Delete articles
- Review articles
- View articles
- Purge articles

As an aside, if multiple KB folders are available, permissions can be set and/or modified on a per folder basis.

KB Comments

Use this tab to specify knowledge base commenting permissions for this role. Note: This tab is only available if the administrator selects custom KB comment permissions in the options tab. Knowledge base feedback permissions cover the role's ability to:

- View article feedback
- Report abusive feedback
- Create feedback
- Reply to feedback added to articles
- Edit personal feedback
- Edit any feedback made
- Delete personal feedback
- Delete any feedback made
- Moderate (approve/delete) feedback

News

Use this tab to specify news permissions for this role. Note: This tab is only available if the administrator selects custom news permissions in the options tab. News permissions cover the role's ability to:

- Create news items
- Modify news items
- Delete news items
- Review news items
- View news items

Tickets

Use this tab to specify ticket permissions for this role. Note: This tab is only available if the administrator selects custom ticket permissions in the options tab. The Ticket permission cover the role's ability to delete tickets. Managers who do NOT want agents to be able to delete tickets can limit that ability here.

Tasks

Use this tab to specify task permissions for this role. Note: This tab is only available if the administrator selects custom task permissions in the options tab. Task permissions cover the role's ability to:

- Create tasks
- Modify tasks
- Delete tasks
- View tasks
- Change the start and end dates for tasks

Call Logs

Use this tab to specify call log permissions for this role. Note: This tab is only available if the administrator selects custom call log permissions in the options tab. Call log permissions cover the role's ability to:

- Create call logs
- Modify call logs
- Delete call logs
- View call logs

Who's On

Use this tab to specify Who's On permissions for this role. Note: This tab is only available if the administrator selects custom Who's On permissions in the options tab. Who's On permissions cover the role's ability to view Who's On visitors and interact with them.

Reports

Use this tab to specify report permissions for this role. Note: This tab is only available if the administrator selects custom report permissions in the options tab. Report permissions give managers the ability to only grant access to specific reports for the role.

Distribution

Use this tab to specify distribution permissions for this role. Note: This tab is only available if the administrator selects custom distribution permissions in the options tab. Distribution permission cover the role's ability to:

- Transfer work items - limits the role's ability to transfer tickets, live chats, etc. to new groups only.
- Transfer work items to specific agents - allows the role to transfer tickets, live chats, etc. to both groups and individual agents within the group.
- View queue - limits the roles' ability to view any tickets and/or live chats that are assigned to the queue.
- Manage their status - Limiting this means an agent can NOT mark themselves as active or inactive in the various groups they're a part of. This would be managed by a user with a role that has this permission, such as a manager or senior agent, if this is restricted for the role.

Events

Use this tab to specify events permissions for this role. Note: This tab is only available if the administrator selects custom events permissions in the options tab. Events permission cover the role's ability to create events for use. If disabled, the agent will NOT have access to SmarterTrack's events system.

Surveys

Use this tab to specify survey permissions for this role. Note: This tab is only available if the administrator selects custom survey permissions in the options tab. Survey permissions cover the role's ability to:

- View Summary - Allows the role to see the Survey tab for tickets and live chats.
- View Details - Allows the role to view the actual survey results and survey details by double clicking the summary in the Survey tab.

Community

Use this tab to specify community permissions for this role. Note: This tab is only available if the administrator selects custom community permissions in the options tab. Community permissions cover the role's ability to:

- Moderate any reported abuse
- Edit any posts
- Delete any posts
- Create new threads
- View threads
- Change thread Statuses

Users / Organization

Use this tab to specify user and organization permissions for this role. Note: This tab is only available if the administrator selects custom user / organization permissions in the options tab. User / Organization permissions cover the role's ability to:

- Edit a user's profile
- Create and edit organizations
- Add and edit organization filters