SmarterTrack 3.x

Help Documentation

Getting Started

SmarterTrack brings all the functionality of a Help Desk, Ticket System, Live Chat, WhosOn, Cost Analysis, Data Mining, Reporting, and Knowledge Base in one software application delivered through one elegant Web interface. The Event-driven architecture in SmarterTrack empowers organizations to develop and automate SLA policies to optimize customer service efforts into a powerful multi-channel communication portal that delivers value, efficiency, and increased satisfaction. Advanced features such as WhosOn, detailed Data Mining, and a Live Chat invite system enhance marketing performance and dramatically increase conversion rates.

Installation and Setup

SmarterTrack can be deployed to standalone dedicated servers or to a web site on a shared hosting account at a hosting company.

- Dedicated Server - A server of which you have total control. Help on installing to a dedicated server can be found at the Dedicated Server Installation page.
- Shared Hosting - A web site at a hosting company, typically managed by the hosting company or through a control panel. Help on installing to shared hosting can be found at the Shared Hosting Installation page.

Determine which database you will be using with SmarterTrack, and follow the instructions in the topic Database Setup to get the database initialized properly.

SmarterPing may be necessary in order for your installation of SmarterTrack to work properly if it is infrequently used or if it is installed on shared hosting. Information about SmarterPing and how to install it can be found at our Community Forums .

Setup Agents

Go to Settings -> Agents and add an agent for every person that will be replying to tickets through the interface. This typically represents your employees or support staff.

Please note that the free version of SmarterTrack is limited to one agent in addition to the admin user. To add more, you must activate the software with a valid license key.

Setup Departments

Departments represent separate logical areas of your organization. Typically, each department will have its own email address, such as support@example.com or sales@example.com.

Set up departments from Settings -> Departments and Groups. During the Setup Wizard, sample departments can be chosen.

If you enable POP importing, ALL email from the Inbox of the account you add will be downloaded into SmarterTrack and deleted from the email account.

Once departments are set up, go to Settings ->to set up their groups, which may consist of just a front-line group, or may include escalation groups, managment, etc. Then attach agents under each group.

Working with Tickets

In order to begin answering tickets, you must log in as an agent and click on the Agent Status link in the left tree to begin receiving tickets in that agent account. Until you do this, tickets will just queue up waiting for an agent to become available.

Other Important Features

Knowledge Base - Set up your Knowledge Base in the Knowledge area, then enable it through Settings -> Customer Portal Settings.

Canned Replies - Enter frequently used responses in the Knowledge area in order to quickly insert them in tickets and chats.

Signatures - Have all agents set up a default signature line to make all responses feel professional.

Interfaces

SmarterTrack comes equipped with two interfaces for customers (Customer Portal Interface) and agents (Management Interface) to work with.

The Customer Portal can be customized to the look and feel of your company, and will be the central hub for your customers, as well as the interface agents will use to log into the SmarterTrack system. This will be the place that your customers will access knowledge base articles and news items and start new customer service tickets and chats. Administrators and managers also have the option to add other functions to the Customer Portal for their customers to access, such as: community forums, purchase or upgrade options, account management options, and many more. For more information on configuring the Customer Portal, see the Customer Portal help page in the Settings folder for System Administrators.

The Management Interface is designed to provide agents and administrators a fully functional workspace to manage all aspects of communication, system management, and agent monitoring. Once an agent has logged in through the Customer Portal, agents will click the Management Interface icon. Agents and managers will then be able to reply to tickets, answer chats, post and review KB Articles, add and edit News Items, add and edit canned replies, and run numerous reports. For more information on these items, see Help for Agents.

The Management Interface is also the place for managers to configure many different settings for their SmarterTrack system. They can monitor chat and tickets; add departments, groups, and agents; and much more. For more information on administrator settings, see the Settings folder for System Administrators.

General Information

What is SmarterTrack?

SmarterTrack is a powerful product built for tracking, managing, and reporting on tickets and live chats (support, sales, etc). It also enables you to view who is navigating your web site and proactively communicate with them. SmarterTrack has many features that increase agent productivity and communication with your customers, whether in a sales or support capacity.

SmarterTrack is built and priced to be both beneficial and accessible to individuals, small businesses, and enterprise-level organizations alike, and is able to support anywhere from one to an unlimited number of agents and an unlimited number of departments for your company. In addition to providing your company with an effective customer support structure, SmarterTrack also offers powerful tracking and effective reporting that help you to manage your costs and scheduling.

SmarterTrack is accessible from a standard web browser, giving administrators and end users connectivity to the system anytime, from anywhere.

How SmarterTrack Works

There are two main components that work together within SmarterTrack: the Web Interface, and the Database Backend. SmarterTrack cannot operate without both of these components being active.

Web Interface

The Web Interface is a web site that is used for administration and interactivity with SmarterTrack. Administrators use this interface to set up departments and establish permissions for agents. Agents use the interface to respond to and manage tickets and chats. Customers can also use the interface to retrieve ticket information or submit new tickets and chats. The web interface can be installed on any IIS 6+ server that is configured with Microsoft .Net 3.5 or higher (.Net 2.0 for versions

Database Backend

SmarterTrack needs a database to use as a data store. SmarterTrack can run with any of the following databases:

- Microsoft SQL Server - Version 2000 or higher (2005 or higher recommended)
- Microsoft SQL Server Express - Version 2005 or higher
- MySQL - Version 4.1 or higher (5.0 or higher recommended)

Browser Support Information

Various browsers interpret information from web pages differently. Due to the differences in browsers, various pages in SmarterTrack may act differently based on the browser and OS being used. Below is a list of various supported browsers, as well as any known issues that may exist.

Windows Browsers	Version	Known Issues
Internet Explorer	8.0	• This browser is currently in BETA, but there are no known issues at this time
Internet Explorer	6.0 and above	• No known issues
Internet Explorer	5.5 and earlier	• Highly recommend you upgrade your browser at http://www.microsoft.com
Google Chrome	Currently in BETA	• The editor tool bar does not format properly within a ticket, KB article, or News Item
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues
Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Mozilla	1.7	• Slight display issues
Safari	3.0	• No known issues
Opera	9.2	• Limited AJAX functionality
Opera	8.5	• Slight display issues
Opera	7.0 and earlier	• Recommend you upgrade your browser to Opera 9.2 at http://www.opera.com

Linux Browsers	Version	Known Issues
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues
Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Mozilla	1.7	• Slight display issues

Macintosh Browsers	Version	Known Issues
Safari	3.0	• No known issues
Safari	2.0	• No known issues
Safari	1.3	• Slight display issues
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues

Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Opera	9.2	• Limited AJAX functionality
Opera	8.5	• Recommend you upgrade your browser to Opera 9.2 at http://www.opera.com

Using SmarterTrack with SmarterNotify

SmarterNotify is an easy-to-use, Windows-based desktop alert program that makes monitoring software applications and networks convenient by eliminating the need for always-open Web browsers and server connections. Because both SmarterTrack and SmarterNotify were built by SmarterTools developers, the two programs are highly compatible. SmarterTrack's events system allows users to act on events that occur throughout the system when certain actions occur, such as the creation of a new ticket or the modification of a KB article. Many users will find that using SmarterTrack in conjunction with SmarterNotify will free up their workspace because there will no longer be a need to keep the SmarterTrack Web application open to receive event notifications from SmarterTrack.

To use SmarterNotify in conjunction with SmarterTrack, you'll need to create an event in SmarterTrack as usual. Then you will need to create a corresponding connection profile in SmarterNotify. For more information on using SmarterTrack with SmarterNotify, refer to the SmarterNotify Online Help document.

Copyright and Trademark Information

Product and Component Acknowledgements

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Interface control provided by•

Charting component produced by

Release Notes

Current release notes are available at http://www.smartertools.com/SmarterTrack/ReleaseNotes.aspx

Installation and Deployment

SmarterTrack System Requirements

SmarterTrack has been designed for minimal requirements in order to be efficient in shared, VPS, or dedicated environments without any loss in functionality or performance.

Minimum Requirements

- Windows XP, Windows Vista, Windows 2003, or Windows 2008
- RAM: 256 MB
- CPU: PII 500
- DISK: 40 MB (100 MB if installing SQL Server Express Edition)
- IIS 6* or higher with the Microsoft .Net Framework 3.5 (including all applicable service packs and/or patches).
- DATABASE: One of the following

- Microsoft SQL Server 2005 or higher (recommended)
- Microsoft SQL Server Express Edition
- MySQL 5.0 or higher (recommended)

*SmarterStats includes a basic Web server so that the product is fully functional upon installation even without the existence of IIS or other web servers. In medium to high volume environments it is recommended that IIS 6 or higher be installed in place of the SmarterStats Web Server for increased performance and security.

NOTE: Each installation and environment is unique. Extra load caused by excessive tickets, chats, agent accounts, and/or other factors may require more disk space, memory, database allocation, etc. No warrantee or guarantee is expressed or implied as to the efficacy or viability of these recommendations for a particular environment or application.

Installation on Shared Hosting

Introduction

SmarterTrack is a ticket management system based on current Microsoft Technologies. It is designed to run on an IIS 5.0 or 6.0 or 7.0 web server that has .Net 3.5 Framework or higher installed. In addition, the software is designed to work with Microsoft SQL Server, Microsoft SQL Server Express Edition, or MySQL databases.

Installation and Setup

Unzip the software

Download the manual installer , and unzip the software to a folder on your computer's hard drive. The unzipped folders and files will have a structure similar to this:

- /SmarterTrack

- /About
- /Alerts
- ...
- /UserControls
- License.txt
- ReadMe.htm
- Online Help

Upload files to your web server

Upload, copy or FTP the contents of the SmarterTrack folder to your web server. Do not change the file and folder structure. You would typically place a "SmarterTrack" folder in your web server's wwwroot directory, but it can also be copied to any sub-directory under a web site's root directory, as long as it is marked as an application starting point. You may have to ask your host for information about how to perform these steps.

NOTE: Your web server must have the Microsoft .Net Framework 2.0 installed before SmarterTrack will function. This is available through Windows Update on the server.

Set proper NTFS permissions on key folders

The following directory of the uploaded SmarterTrack installation need to have read, write, delete, and modify permissions in the file system:

- SmarterTrack/App_Data (and all subdirectories)

If you do not have access to the file system permissions, ask your hosting company to set the permissions for you.

Database Setup

SmarterTrack requires a Microsoft SQL 2005 or MySQL 5.x database to contain the ticket and configuration data. You will need the following information to connect to the database:

- Database Server IP Address (or hostname)
- Database Name
- Database Username (needs to be a DBO, Database Owner)
- Database User's password

If you do not know this information, log into your Control Panel and locate the Database Manager (this may be named differently depending on your Control Panel). In this area, you will be able to create and manage your SQL (or MySQL) databases. If you have any particular questions on this area, please contact your hosting company.

Configure SmarterTrack

With a web browser, navigate to the URL of your SmarterTrack installation. If a login page comes up, login as the administrator. Use the following login information:

- Username: admin
- Password: admin

After logging in, you should be taken immediately to the setup wizard. Choose your database type and enter the information that lets SmarterTrack connect to the database you have already established. If you need help with these settings, consult your administrator or hosting provider. Click [next] to connect to the database and continue to follow the instructions to complete the setup of SmarterTrack.

Install SmarterPing on a Desktop (if necessary)

SmarterPing may be necessary in order for your installation of SmarterTrack to work properly. Information about SmarterPing and how to install it can be found in section 4 , below.

Troubleshooting

If you are experiencing difficulty installing and running the software, please visit the FAQ and support section on our web site where a lot of questions are already answered. Some of the most common causes for errors are:

- Invalid permissions - The folders referred to in 2.3 might have invalid permissions, in which case SmarterTrack will not function properly. Talk to your administrator to help ensure that these have been set properly
- Microsoft.Net Framework - SmarterTrack requires the Microsoft.Net Framework 2.0 in order to function properly. This must be installed AFTER IIS. If you added IIS after installing the Framework, you will have to uninstall the Framework and reinstall it. The Microsoft.Net Framework is available from Windows Update.
- DirectX 9.0 or Higher - A bug in Microsoft's original OpenGL implementation causes charts

to stop generating after a period of time. To remedy this problem, your server may need to have DirectX installed. Get the latest version of DirectX by using Windows Update.

• The home page does not appear correctly - Check to ensure that the Microsoft.Net framework version 2.0 have been installed on the server. The Microsoft.Net Framework is available from Windows Update.

If your error does not fall into these categories, navigate your web browser to http://your_smartertrack_url/about/checkup.aspx. Pay attention to any failures that appear, and if you cannot determine the cause of a problem, refer to the Technical Support pages or our Web site.

Regarding SmarterPing

SmarterPing is a web-site keep-alive utility that will aid those in lower-activity installations of SmarterTrack. As a user of SmarterTrack, you may download and use this utility at no charge. If an agent will not frequently be looking at tickets and you have set SmarterTrack up to email agents when new tickets come in, this tool is required for SmarterTrack to function correctly.

Simply add the url "http://YOUR_SMARTERTRACK_URL/Ping.aspx" to SmarterPing and set it to ping every 10 mintues. SmarterPing operates as a Windows Service, so you do not have to stay logged in for it to work.

Download and try SmarterPing .

SmarterTrack comes as a single installation file that contains everything necessary to run the product. The SmarterTrack automated installer can be downloaded from www.smartertools.com . The FREE edition and the licensed version of SmarterTrack are both contained within this installation file, so it will not be necessary to download or install the file again if you purchase a license after trying the FREE edition.

Note: Users of Windows 2003 Advanced Server may need to install SmarterTrack from Add/Remove Programs in the control panel in order for file permissions to be properly set.

If you have IIS 5.0 or later, it is recommended that you run the SmarterTrack web interface under IIS instead of using the built-in web server for performance reasons. (See the help topic Running as an IIS site for more information).

Running as an IIS Site

By default, SmarterTrack will install a basic web server that allows you to start using SmarterTrack immediately after installation. However, it is recommended that you move SmarterTrack to a more robust and secure web server, such as Microsoft's Internet Information Server (IIS). To configure

SmarterTrack to run under IIS 6.0 or higher, follow the step-by-step instructions below. For IIS 7.0 in Windows 2008, refer to the end of this page.

Note: This topic assumes that you are familiar with IIS and how it works. SmarterTools recommends that you use the web server included with SmarterTrack if you do not feel comfortable using IIS.

Install IIS (if necessary)

- Click on Start -> Control Panel -> Add Remove Programs
- Click on Add / Remove Windows Components
- Check the box for Internet Information Services (IIS)
- Complete the Wizard and wait for the installation to complete
- If Microsoft.Net mappings are not correct (for example, if you install IIS after Microsoft.Net), run the following at the command prompt :

- c:
- cd \Windows\Microsoft.Net\Framework\v2.0.50727
- aspnet_regiis -i

Disable the SmarterTrack Web Server

These steps will stop and disable the Web Server included with SmarterTrack. They will also have the side-effect of disabling the shortcut to SmarterTrack on your desktop until you update it with the new URL for SmarterTrack.

- Click on Start -> Program Files -> SmarterTools -> SmarterTrack -> Configure SmarterTrack Web Server
- Click on the Stop button
- Change the Startup Mode to Disabled and click on the Apply button
- Click on the Close button

Add SmarterTrack to IIS

- Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
- Right-click on the web sites tree on the left of the page and choose New -> Web Site
- When asked for a description, enter SmarterTrack
- Choose the IP address to use for web interface. If this IP address is shared with another web site, you will need to use a different port or Host Headers. For more information about using Host Headers, refer to the IIS documentation
- For Path, use "C:\Program Files\SmarterTools\SmarterTrack\MRS" (or use the location in which you installed SmarterTrack)
- Leave the "Allow anonymous access to this web site" box checked

• When asked what permissions to grant, choose only Read and Run Scripts
• Finish the wizard

Verify IIS Settings

• If you are using Windows 2003, verify that the ASP.NET v2.0.50727 Web Service Extension is set to Allowed in IIS. If you do not see ASP.NET under Web Service Extensions, ensure that ASP.NET is enabled in the Application Server. (Control Panel -> Add / Remove Programs -> Windows Components -> Application Server -> Details)
• Ensure that the default document for the site is Default.aspx (under the Documents tab)

Update DNS

• If any domains are already setup with pointers to SmarterTrack, make sure to update their DNS records to point to the new IP address.

Test the Site

• Open up a web browser, and type in the IP address of the site you just added.

Configuring IIS7 for Windows 2008

Disable the SmarterTrack Web Server

These steps will stop and disable the Web Server included with SmarterTrack. They will also have the side-effect of disabling the shortcut to SmartTrack on your desktop until you update it with the new URL for SmarterTrack.

• Click Start -> Program Files -> SmarterTools -> SmarterTrack -> Configure Smarter Track Web Server
• Click Stop
• Change the Startup mode to Disable, and click Apply
• Click Close

Add an Application Pool

• Click Start -> Control Panel -> Administrative Tools -> Internet Information Service (IIS) Manager
• Right click Application Pools and select "Add Application Pool"
• Name the pool "SmarterTrack" (or something similar)
• Set manage Pipeline Mode to "Classic" and click OK
• Click Close

Add SmarterTrack to IIS

• Click Start -> Control Panel -> Administrative Tools -> Internet Information Service (IIS) Manager
• Select Server Name -> Open ISAPI and CGI Restrictions -> Verify that ASP.NET v2.0 is allowed. (If not, right click ASP.NET v2.0 and select "Allowed")
• On the left side of the page, right click Sites and Choose "Add Website"
• Name the Site SmarterTrack
• If you created an Application Pool name other than "SmarterTrack" click Select and choose the correct Application Pool.
• For the physical path, browse to the SmarterTrack\MRS folder. The default location is: C:\Program Files\SmarterTools\SmarterTrack\MRS
• For Binding, choose an IP Address to use for Webmail. If this IP address is shared with another Web site, you will need to use a different port of Host Headers. For more information about using Host Headers, refer to the IIS documentation.
• Click OK

Verify IIS Settings

• In IIS Manager click Server Name. Under Security, double click ISAPI and CGI Restrictions. Then, verify that ASP.NET v2.0 is allowed. If it is not, right click on ASP.NET v2.0 and select "Allowed."
• In IIS Manager double click Sites -> Double click the SmarterTools site -> Double click on the App_Theme folder. Under HTTP features, double click HTTP Response Headers. Under the Action menu, click Set Common Headers -> check Expire Web content -> click After -> click the add 7 for the number of days -> click OK
• In Administrative Tools under Services, verify the World Wide Web Publishing Service is Running

Database Setup

Choose the database you want to use from the list below for instructions on setting it up. If you are using a hosting company that provides you with your database, you may need to contact them to make some of the necessary changes.

Microsoft SQL Server Express

SQL Server Express is a free version of SQL Server 2005. It is the recommended database on most systems, except for those that have access to the non-Express version of Microsoft SQL Server. It has no connection limits like MSDE does, and is much easier to backup and restore. It also supports databases of up to 4 GB in size.

Note: The automated installer for SmarterTrack includes the option to install SQL Express Edition. This is the easiest way to get started.

Manual Method

Download SQL Server Express Edition - It is recommended to also download Management Studio Express.

- Using Management Studio Express, create an empty database for SmarterTrack.
- Using Management Studio Express, create a user (SQL or Windows Authentication) that has DBO permissions over the new database you created.
- Log into SmarterTrack (by default using "admin" for both username and password) and the Database Settings page should appear.
- Choose SQL Server and either Windows or SQL authentication mode.
- When asked for the database server, enter "server\SQLExpress", substituting the IP or name of the SQL Server for the "server" value.
- Choose Integrated Authentication if you chose the default SQL Express setup during SmarterTrack installation.
- Enter the rest of the requested values and click on Next to have SmarterTrack create all necessary tables for you.

Microsoft SQL Server (2000, 2005, or higher)

SQL Server is an Enterprise-Grade database server available from Microsoft. While most of the functionality is identical to Express Edition, it does not have some of the usage restrictions like Express Edition does (such as the 4 GB database size limit). More information about SQL Server 2005

The process for connecting SmarterTrack to Microsoft SQL Server is nearly identical to the process for using Microsoft SQL Server Express Edition (See instructions above).

The primary difference is that you will usually not need to specify an instance name (like \SQLEXPRESS) in the database server field when attaching to the database.

MySQL 4.1 or Higher

MySQL is a free database package that competes against Microsoft SQL Server. It also works well with SmarterTrack, but our tests have shown slightly higher performance with SQL Server (Express and regular editions) when dealing specifically with SmarterTrack.

More information about MySQL - It is recommended to also download the GUI tools .

• Using MySQL Administrator, create an empty schema (database) for SmarterTrack.
• Using MySQL Administrator, create a user that has DBO permissions over the new database you created.
• Log into SmarterTrack (by default using "admin" for both username and password) and the Database Settings page should appear.
• Choose MySQL as the database type.
• Enter the requested values and click on Next to have SmarterTrack create all necessary tables for you.

Activating SmarterTrack

UPDATE: Activating an installation on this version requires manual activation. Please contact the SmarterTools Sales Department for assistance.

In order for SmarterTrack to function for more than 1 agent, the product must be licensed and activated. If you move SmarterTrack to another server, or assign it to a different database, you may have to re-activate the product in order for it to function properly. To get to the product activation wizard, click on the Help menu and choose Activate Product.

If you have any difficulties activating SmarterTrack, please contact SmarterTools sales. Information can be found at www.smartertools.com .

Upon going to the Activate Product page, you will be presented a screen showing your current license details. In order to complete this step, you will need a valid license key obtained through SmarterTools or a SmarterTools Reseller. Enter the information from the email into the box and click on Activate Now to complete the activation.

There are no limits to how many departments or tickets can be used in SmarterTrack.

Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request.

Upgrading SmarterTrack

In order to upgrade an older version of SmarterTrack to the most recent 3.x release, perform the instructions below under the section that represents the installer you used when setting up the product. These methods will maintain all of your configuration data.

Starting with version 3.5, SmarterTrack has been upgraded from a Microsoft.Net 2.0 application to a Microsoft.Net 3.5 application. Because of this change, there are a few changes that may be required if you run SmarterTrack as an IIS application and are upgrading from a version prior to 3.5.

First of all, the Microsoft.Net 3.5 Framework must be installed on the server in order for SmarterTrack 3.5 to work. If you control the server yourself, we recommend installing .Net 3.5 from Windows Update. If you are on a shared hosting plan, we recommend you talk with your hosting company to make sure .Net 3.5 is supported BEFORE you upgrade.

Next, if you have customized the web.config file for your company, we recommend using the new one included with the product, and adding back in your changes. Due to the framework changes between 2.0 and 3.5, there are many changes.

Lastly, to avoid any contention or issues with other .Net sites running on your server, we recommend configuring the SmarterTrack web site to run under its own application pool.

Automated Installer

- Backup your SmarterTrack installation and Database
- If you are running SmarterTrack under IIS, stop IIS during the upgrade process
- Download and run the latest automated installer from the SmarterTrack Download page
- When asked where to install the product, install into the same location as it was installed before (by default C:\Program Files\SmarteTools\SmarterTrack)

Manual Installer

If you have access to IIS on the server (dedicated server or VPS hosting)

- Backup your SmarterTrack installation and Database
- Download the latest manual install package from the SmarterTrack Download page
- Extract the contents of the package to a temporary directory
- Stop IIS or the web application pool running SmarterTrack
- If you have made customizations to the web.config file in your existing install, back it up
- In your current SmarterTrack site, delete the following folders (do not delete any others):

- /bin
- /MasterPages/Horizon
- /App_Themes/Horizon
- Copy the files from the SmarterTrack folder of the installation package into the site's location. They should fairly closely represent what is already there
- If you have made customizations to the web.config file in your existing install, copy it back to

the site from the backup

- Restart IIS or the web application pool running SmarterTrack

If you DO NOT have access to IIS on the server (shared hosting):

- Backup your SmarterTrack installation and Database
- Download the latest manual install package from the SmarterTrack Download page
- Extract the contents of the package to a temporary directory
- If you have made customizations to the web.config file in your existing install, back it up
- In your current SmarterTrack site, delete the following folders (do not delete any others):
- /MasterPages/Horizon
- /App_Themes/Horizon
- Copy the files from the SmarterTrack folder of the installation package into the site's location. They should fairly closely represent what is already there
- If you have made customizations to the web.config file in your existing install, copy it back to the site from the backup
- If not, perform the following steps

- Open web.config in notepad
- Add a space at the very end of the file (to make notepad know it changed)
- Save the file
- IIS will detect the change and restart the site

Performing a Full Uninstall

Note: Following these steps is not necessary to upgrade an existing installation.

The steps below can be taken to completely delete all SmarterTrack related files and data from a system.

Uninstall SmarterTrack and files:

- In add/remove programs uninstall SmarterTrack (if you used automated installer)
- Delete the installation directory (usually c:\program files\SmarterTools\SmarterTrack) to remove cached files and configuration data

Uninstall database (if you used the automated SQL Express installer):

- Go to Start -> Run
- Type in "sqlcmd -S localhost\SmarterTrack" and press enter
- Type "Drop database SmarterTrack" and press enter
- Type "Exit" and press enter

• In add/remove programs uninstall Sql Server Express Edition (choose the SmarterTrack data source to uninstall)

Automation with Web Services

SmarterTrack was built with custom configuration in mind. In addition to being able to customize the look and feel of SmarterTrack, developers have the ability automate the SmarterTrack application using several different web services. Using these web services, external programs can create tickes in an automated fashion, grab information about the data in the system, and more.

To view the web services and the corresponding functions available to you, go to your default Web Interface install location and append "services/SERVICENAME.asmx". For example, with the default installation, you would use http://127.0.0.1:9996/Services/ServiceName.asmx.

To get a brief explanation of the web services available to you, along with the default installation paths to the specific web services details page, download the Automation with Web Services document.

Help for Agents

Getting Started as an Agent

In general, there is a regular pattern for using SmarterTrack as an agent. Understanding this pattern can make using SmarterTrack much easier and lead to better reporting and administration.

Log in to SmarterTrack - The link for the SmarterTrack website will need to be obtained from the SmarterTrack Administrator. This link will take you to the Customer Portal. Once you have logged in, click the Agent Interface icon to take you to the Management Interface where you can begin to manage your tickets and chats.

Start Receiving Tickets & Chats - Click the Workspace button from the Main toolbar, then select Agent Status in the left tree view to edit the Chat and Ticket groups you are currently active in. You can be members of multiple departments and groups at the same time. See the Agent Status folder for more information.

Work with Tickets - Click the Workspace button from the Main toolbar and spend time in the My Tickets and My Chats page to deal with current tickets and chats. Keep an eye on the page through the day to see new issues that may come in.

Log out - At the end of the day, log out of SmarterTrack using the Log Out link at the top right of the page. If you wish to hand-off your tickets to other group members do so using the pop up screen after click the log out link.

Agent Status

This page will allow an agent to view all the chat and ticket groups that they are a member of, as well as giving them the ability to start and stop activity within those groups.

To get started, click the Workspace button from the Main toolbar, then select Agent Status from the left tree view.

Chat Groups

This tab will list all chat groups an agent is a member of. If they are currently receiving chats within that group, there will be a green arrow to the left of the department name. On the other hand, if they are currently not receiving chats within that group, there will be red square next to the department name.

To start receiving chats in a particular Group, select the group and click the Start icon from the Actions toolbar.

To stop receiving chats in a particular Group, select the group and click the Stop icon from the Actions toolbar.

To momentarily stop receive chats, select the group and click the Toggle AFK (Away From Keyboard) icon from the Actions toolbar. Note: When the Toggle AFK icon is used, agents will not receive any new chats, but existing chats will stay in their possession.

Double-clicking on a group name will stop and start that particular group.

Ticket Groups

This tab will list all ticket groups an agent is a member of. If they are currently receiving tickets within that group, there will be a green arrow to the left of the department name. On the other hand, if they are currently not receiving tickets within that group, there will be red square next to the department name.

To start receiving tickets in a particular Group, select the group and click the Start icon from the Actions toolbar.

To stop receiving tickets in a particular Group, select the group and click the Stop icon from the Actions toolbar.

Double-clicking on a group name will stop and start that particular group.

Workspace

Tickets

My Ticket Overview

The My Tickets page provides a view of all tickets for which an agent is responsible. By clicking on a ticket, you can view more details, reply, or perform many other actions.

To get started, click the Workspace button from the Main toolbar, then select My Tickets from the left tree view.

All active tickets will be listed when an agent reaches this page and you may see the following icons across the action toolbar.

Action Toolbar

Transfer - This will transfer all selected tickets to another group or agent. For more information on transferring a ticket, see the Transfer a Ticket help page.

Status - This gives you different options of what you can do with selected tickets.

- Mark as Active - This puts all selected tickets into the active state.
- Mark as Waiting on Customer - This puts all selected tickets into the waiting on a customer folder. These tickets will no longer be visible on your active screen, and after a certain amount of time set by your system administrator, tickets in the waiting on a customer folder will auto-close if there has been no response from the customer.
- Mark as Closed - This puts all selected tickets into the closed state.
- Mark as Closed and Locked - This puts all selected tickets into the closed state and does not allow a customer to continue using that ticket number. Usually you will choose this status if the customer has a tendency of reopening existing tickets when new tickets should be created.
- Pin Ticket - This will guarantee that the ticket stays assigned to you and won't be assigned to another agent even if you log out and hand-off your tickets. If a ticket is pinned, all replies that are received from that customer, will be assigned to that same agent no matter their status. Note that if you administrator enables automatic ticket rebalancing, pinned tickets could be reassigned.
- Unpin Ticket - This will return a ticket to a non-pinned status.

Priority - This gives you different priority options for selected tickets.

- Mark as Urgent Priority - The selected tickets are very important and will show at the top of the list.
- Mark as High Priority - The selected tickets are a high priority and will be sorted to the top of the lists.
- Mark as Normal Priority - The selected tickets have a normal or unspecified priority level.
- Mark as Low Priority - The selected tickets have a low priority and will be sorted to the bottom of the lists.

Delete - This will delete all selected tickets. A confirmation box will be shown. Deleted tickets will still be available within the system until a system administrator has purged them.

Spam - This will send selected tickets to a spam folder for system administrators to monitor. A confirmation box will be shown. Tickets marked spam will still be available within the system until a system administrator has purged them.

Search - This will allow agents to conduct a contextual search within the current page that they are viewing. For a more in depth search, see the Using Advanced Search help topic. The following fields will be available:

- Search Criteria - Enter specific search words the search will be based on.
- Custom Field - Select a custom field from the drop down list.
- Time - Select a time frame from the drop down list the search will encompass.
- Max Results - Select the maximum number of results the search should display.

Get From Queue / Push From Queue - This will pull a ticket from the queue and assign it to the agent being viewed. This is most useful when you have chosen Cherry Picking as the ticket distribution method for your group. For more information see Ticket Distribution Methods.

Refresh - Depending on the settings you have made, the page may or may not automatically refresh itself at regular intervals. Use this button to force the page to refresh.

Columns in Table

Columns may be customized by using the column selector icon in the upper right of the grid.

Check Box - Use the boxes to select tickets on which to perform actions. Tickets must be selected before choosing an action from the drop down action menu.

Status - This column shows the current status and priority of the ticket. See above for status definitions.

Ticket Number - This number uniquely identifies the ticket in the system.

Subject - The subject of the first email that started the ticket. Very long subjects will be truncated.

Email - The email address of the sender of the ticket.

Department - The group that is assigned to this ticket.

Agent - The agent that is currently assigned to the ticket.

Messages - How many emails have gone back and forth between agents and the customers. In general, the higher the number, the longer the conversation has been going on.

Started - This column will tell the agent the specific date and time the first ticket was received.

Idle - The amount of time that has accumulated that an agent should have acted upon a ticket. Note: When a ticket is transferred, the idle time does not reset in the grid, so that agents may see how long the customer has been waiting. Reports, however, reflect the idle time at each step along the ticket's journey.

Pin Icon - This icon may appear next to the idle time. It indicates that a ticket is pinned. For more information see Pin Ticket above.

View a Ticket

To view a ticket, click a ticket to have it displayed at the bottom of your screen or double click a ticket to bring it into a pop-up window.

This page shows the details and history for the selected ticket. The various areas concerning this page have been broken into sections and are explained in detail below.

Header Bar

Ticket Number - The header bar shows the ticket number of the message.

Email - This is the email that originated the ticket.

Note: If the customer has a ticket in multiple groups, it will also appear in this area.

Button Bar

Reply - Click this icon to compose a reply to the ticket. For more information on replying to a ticket, see the Reply to a Ticket help page

Transfer - This icon allows an agent to transfer this ticket to another group or agent.

Add Comment - This icon allows an agent to add a note or a resolution to the ticket. The advantage of adding resolutions to tickets, will give organizations the ability to automatically supply agents with resolutions to issues as SmarterTrack evolves.

Print - This icon will allow an agent to send the contents of the visible message to the printer.

Priority - This icon allows an agent to attach a priority level to this ticket. For more information about the different priority levels, visit the My Ticket Overview help page.

Take Ticket - This icon gives an agent the ability to manually take a ticket from the queue for groups they are a member of.

Tabs Within the Ticket

Communication - This will display a full history of the ticket, including comments and resolutions for the ticket. The communication for any linked tickets will also appear..

Custom Fields - This will display all fields that have been set up by your administrator to help customize the ticket. This information can be populated by a user, an agent, or a 3rd party application by an administrator.

Details - This will display all specific details and activity that has happened with this ticket.

Related Items - Enter a similar chat or ticket number that you can attach with the current ticket.

KB - This displays relevant KB articles to the issue of the ticket.

Resolutions - This displays possible resolutions to the ticket.

Ticket Content

The contents of the ticket are shown in the larger portion of the window. If attachments are present in the email, links for them will appear in the window.

Reply to a Ticket

After you receive a ticket, click the Reply icon to begin generating a return email to the customer. The following icons will be displayed.

Send - When your reply is composed, you can send it out with this button. Hover over the button for a moment, a menu will appear with reply options for special situations—Send and Mark Active, Send and Mark Waiting for a Customer, Send and Mark Closed, and Send and Mark Closed and Locked. For information about the definitions of these, visit the My Ticket Overview help page.

Replies - A window will pop up that allows an agent to choose from the canned responses that have been set up. Clicking on a response will include it in the beginning of your reply.

Add Comment - This icon allows an agent to add a note or a resolution to the ticket.

Priority - This icon allows an agent to attach a priority level to this ticket. For more information about the different priority levels, visit the My Ticket Overview help page.

Close/Cancel - This icon will close the compose window and all information that was typed will not be saved.

Email Header Information

To - Enter the recipient of the message. Separate multiple addresses with a semi-colon.

Cc - Enter any email addresses that should receive carbon copies of the email. Separate multiple addresses with a semi-colon.

Bcc - Enter any email addresses that should receive blind carbon copies of the email (not shown to recipients). Separate multiple addresses with a semi-colon.

Subject - The subject of the message.

Attachments - To add attachments to the reply, enter a full path to a file or browse to it, then click on upload and it will be added to the reply.

Message Body

An agent may compose the reply to the customer in the large editing box on the page. The default font face and size for replies can be set in My Settings.

Transfer a Ticket

In SmarterTrack a ticket may be transferred to a group or to a specific agent within a group. Tickets may need to be transferred for a variety of reasons. Some of these reasons might be escalation within a group, transfer to a different department such as billing, and much more.

To transfer a ticket, select a ticket and then click the Transfer icon from the Actions toolbar.

New Group - Select the Department and Group for the ticket to be transferred to.

New Agent - Select the agent you would the ticket to be assigned to. If "Auto-Assign" is selected, the ticket will be assigned to an agent within that department based on the chosen ticket distribution method.

Pin Ticket - If you know that the ticket should stay with the person to whom you are transferring, check this box to pin it to them.

New Status - Select the status that you want the ticket set to upon transfer. Usually, you will want to leave the status as Active.

Transfer Note - Transfer notes can be entered for later reference as to what actions may have been taken, or why the ticket was transferred. The last ticket note entered appears in the conversation history when viewing the ticket, making it a very useful way of passing along comments.

Note: When a ticket is transferred, idle time is not reset for the new agent.

When you are done filling out the fields, click on OK to finalize the transfer.

Using Advanced Search

The Search Tickets page allows you to enter more specific search parameters than the basic contextual search. To make searching faster, try limiting your date range or avoiding searches on body text.

To begin a search, click the Workspace button on the Main toolbar, then select Advanced Search from the left tree view.

General Criteria

Ticket Number - Enter a specific ticket number here if you know the specific ticket that you are searching for.

Search String - Enter searchable words here to help identify a ticket. This will use the words entered and search the body, subject, and notes area of the ticket.

Email Address - Enter a specific email address that you might be searching for.

Date Range - Enter a date that you want your search to span. Click the calendars to help select specific days.

Department - Select a department from the drop down list that you want to search for a specific ticket.

Agent - Select an agent from the drop down list that you want to search.

Status - Select a specific status from the drop down list that the ticket you are searching for contains.

Priority - Select a specific priority from the drop down list that the ticket you are searching for contains.

Sort Results - Select how you want your search results displayed.

Max Results - Select the maximum number of search results that you want displayed.

Custom Fields

There can be any number of custom fields set up by your administrator to aid in the defining of search criteria. Consult your system administrator for help with custom fields.

Tickets in Queue

Tickets in Queue are tickets that have been received, but have not yet been assigned to agents. In order for a ticket to be assigned to an agent, the agent must be logged in and receiving tickets for the corresponding group.

The list of tickets is presented using the standard ticket view. For more information on using the page, please refer to the help topic My Ticket Overview .

For information about how SmarterTicket assigns tickets from the queue, please refer to Ticket Distrubution Models.

Create a New Ticket

Creating a ticket is useful when you wish to send something directly to the customer while creating a ticket at the same time. For example, if a customer calls on the phone and requests information, and you have it available right away, you may want to create a ticket with the responses the customer wants and mark it closed right away.

To begin a new ticket, click the Workspace button from the main toolbar, then select New Ticket from the left tree view. When you do that, a window will pop up with the following information.

You will see the following icons:

Send Menu - When your reply is composed, you can send it out with this button. Hover over the button for a moment, a menu will appear with reply options for special situations—Send and Mark Active, Send and Mark Waiting for a Customer, Send and Mark Closed, and Send and Mark Closed and Locked. For information about the definitions of these, visit the My Ticket Overview help page.

Replies - Pops up a window that allows an agent to choose from the canned responses that have been set up. Clicking on a response will include it in the beginning of your reply.

Add Comment - This icon allows an agent to add a note or resolution to a ticket.

Priority - This icon allows an agent to attach a priority level to this ticket. For more information about the different priority levels, visit the My Ticket Overview help page.

Compose

To - Enter the recipient of the message. Separate multiple addresses with a semi-colon.

Cc - Enter any email addresses that should receive carbon copies of the email. Separate multiple addresses with a semi-colon.

Bcc - Enter any email addresses that should receive blind carbon copies of the email (not shown to recipients). Separate multiple addresses with a semi-colon.

Subject - The subject of the message.

Group - Select the group and agent from the drop down list that you want this ticket assigned to.

Incoming Ticket - Check this box if you want this ticket to become an inbound ticket within the SmarterTrack system.

Attachments - To add attachments to the reply, enter a full path to a file or browse to it, then click on upload and it will be added to the reply.

Live Chat

My Chat Overview

The My Chats page provides an overview of all chat for which you are responsible. By clicking on a chat, you can view more details, reply, or perform many other actions.

To get started, click the Workspace button from the Main toolbar, then select My Chats from the left tree view.

All of an agent's active chats will be listed on this page and they may see the following icons across the action toolbar.

Action Toolbar

Transfer - This will transfer all selected chats to another group or agent.

Search - This will allow agents to conduct a contextual search within the current page that they are viewing. For a more in depth search, see the Using Advanced Search help topic. The following fields will be available:

- Search Criteria - Enter specific search words the search will be based on.
- Custom Field - Select a custom field from the drop down list.
- Time - Select a time frame from the drop down list the search will encompass.
- Max Results - Select the maximum number of results the search should display.

Refresh - Depending on the settings you have made, the page may or may not automatically refresh itself at regular intervals. Use this button to force the page to refresh.

Columns in Table

Visible columns can be selected using the column selector icon on the top right of the grid.

Check Box - Use the boxes to select chats on which to perform actions. Chats must be selected before choosing an action from the drop down action menu.

Status - This column shows the current status and priority of the ticket. Possible icons are shown below.

- Active - This ticket is open and awaiting an agent to take action
- Waiting - This ticket is waiting for the customer to reply to the ticket
- Closed - This ticket is closed

Chat Number - The number that uniquely identifies this chat.

IP - This will display that IP Address of where the chat was generated.

Name - This will display the name of the person who generated the chat.

Department - The group that is assigned to this ticket.

Duration - This is the total length of the chat.

Idle - The amount of time that has passed since a message was sent by an agent for that chat. Idle time does not reset when a message is sent by a customer.

Email - The email of the customer as they filled it out in the start chat window.

Agent -The name of the agent chatting with the customer.

Messages - The number of messages in the chat.

Started At - The date and time that the chat started.

Time in Queue - If the chat is in the queue, this is the time it has been waiting for an agent response.

City, Region, Country -The geographic region of the customer, if available.

Language -The primary language of the customer as set by their browser.

Language with Locale - The primary language of the customer as set by their browser. Includes their locale as well, which is usually their region.

Browser - The browser that the customer is using, if available.

Operating System - The operating system that the customer is using, if available.

View a Chat

To view a chat, click a chat to have it displayed at the bottom of your screen or double click a chat to bring it into a pop-up window.In the preferences page, you can configure SmarterTrack to automatically pop up new chats regardless of where you are in the application.

This page shows the details and history for the selected chat. The various areas concerning this page have been broken into sections and are explained in detail below.

Header Bar

Chat Number - This is the unique number associated with this chat.

Display Name - This is the display name of the person who generated the chat.

Button Bar

End Chat - Click this icon to end the chat session.

Transfer - This icon allows an agent to transfer this chat to another group or agent.

Push Page - This icon allows an agent to pop up a web page on the customer's computer.

Add Comment - This icon allows an agent to add a note or resolution to the chat.

Print - This icon will allow an agent to send the contents of the chat to the printer.

Tabs Within the Chat

Conversation - This will display a full history of the chat. If the chat is ongoing, this tab contains the interface that you will use to communicate with the customer.

Custom Fields - This will display all fields that have been set up by your administrator to help customize the ticket.

Comments - This will display any comments you have made concerning this chat or customer.

Details - This will display all specific details and activity that has happened with this ticket.

Related Items - Enter a similar chat or ticket number that you can send to with the ticket.

KB - This displays relevant KB articles to the issue of the ticket.

Browser - If web pages have been pushed to the customer, the browser tab allows agents to see what the customer is looking at.

Map - If enabled in General Settings, the map tab will show a map of the geographic location of the customer.

If the chat is ongoing, this tab contains the interface that you will use to communicate with the customer.

Transfer a Chat

In SmarterTrack a chat may be transferred to a group or to a specific agent within a group. Chats may need to be transferred for a variety of reasons. Some of these reasons might be escalation within a group, transfer to a different department such as billing, and much more.

To transfer a chat, select a chat and then click the Transfer icon from the Actions toolbar.

New Group - Select the Department and Group for the chat to be transferred to.

New Agent - Select the agent you would the chat to be assigned to.

Add Comment - Transfer notes can be entered for later reference as to what actions may have been taken, or why the chat was transferred.

When you are done filling out the fields, click on OK to finalize the transfer.

Using Advanced Search

The Search Chats page allows you to enter more specific search parameters than the basic sidebar search. Searches may take some time to complete. To make searching faster, try limiting your date range or avoiding searches on body text.

To begin a search, click the Workspace button on the Main toolbar, then select Advanced Search from My Chats in the left tree view.

General Criteria

Chat Number - Enter a specific ticket number here if you know the specific ticket that you are searching for.

Customer Name - Enter the name of the customer you are searching for.

IP Address - Enter the IP Address that you are searching for.

Search String - Enter searchable words here to help identify a ticket.

Date Range - Enter a date that you want your search to span. Click the calendars to help select specific days.

Department - Select a department from the drop down list that you want to search for a specific ticket.

Agent - Select an agent from the drop down list that you want to search.

Status - Select a specific status from the drop down list that the ticket you are searching for contains.

Sort Results - Select how you want your search results displayed.

Max Results - Select the maximum number of search results that you want displayed.

Custom Fields

There can be any number of custom fields set up by your administrator to aid in the defining of search criteria. Consult your system administrator for help with custom fields.

Chats is Queue

Chats in Queue are chats that have been received, but have not yet been assigned to agents. In order for a chat to be assigned to an agent, the agent must be logged in and receiving chat for the corresponding group.

The list of chats is presented using the standard chat view. For more information on using the page, please refer to the help topic My Chat Overview .

Chats are assigned from the queue based on your chosen Chat Distribution Model.

Knowledge Base

Knowledge Base Overview

The Knowledge Base is a group of articles to help agents and customers solve an issue quickly and efficiently. The knowledge base page lists all of your articles in one place and can get grouped and organized by using root folders that you designate.

To get started, click the Knowledge button on the Main toolbar, then select the Knowledge Base control bar from the left.

To see a list of your current Knowledge Base articles, click Root from the left tree view. To add a new root folder, click the Green Plus Sign from the folders toolbar. To edit an existing Root folder, select the folder and then click the Pencil from the Folder toolbar.

While you are looking at a list of your knowledge base articles, you will notice 5 icons across the Actions toolbar— New , Edit , Delete , Search , and Refresh .

New - This icon allows you to add a new knowledge base article.

Edit - This icon allows you to edit an existing knowledge base article.

Delete - This icon allows you to delete an existing knowledge base article.

Search - This icon allows you to search for a particular knowledge base article.

Refresh - This icon allows you to manually refresh the page.

Knowledge Base articles are also classified by 3 different statuses— Drafts , Flagged for Review , and Stale Articles .

Drafts - These are articles prepared by an agent, but will not be available publicly until they have been read and marked reviewed by another agent.

Flagged for Review - These are articles that have been marked by an agent that the contents need reviewed. It is available to be viewed.

Stale Articles - These are articles that have not been read within a certain amount of time set by your system administrator.

Agents can also search through the Knowledge Base articles by clicking Advanced Search from the left tree view and then filling out some or all of the following fields.

Search String - Enter the text string you wish to search for.

Date Range - Enter a date range you wish to search within.

Folder - Select the specific folder you would like to search from the drop down list.

Status - Select a specific status you would like to search from the drop down list.

Max Results - Select the maximum number of results you would like displayed from the drop down list.

Create a New Article

Agents can create new articles to add to the knowledge base area. To get started, click the Knowledge button from the main toolbar, then select New Article from the left tree view or click the New icon from the actions toolbar.

Once you do that, a new screen will pop up asking for the following information. No new information will be saved until you have clicked the Save icon in the upper left hand corner of the window.

Compose

Title - Enter the title of the new article.

Folder - Choose a folder from the drop down list that you would like this article to be placed.

Keywords - Enter searchable keywords that are relevant to this article.

Summary - Write a brief summary of the article.

Body - Enter the contents of the article in this area.

Tool Bar - In addition to standard text formatting tools, the KB creation tool bar includes the following to strip formatting, insert images, flash, videos, documents, and code blocks into KB articles:

- Format Stripper - This button allow an agent to take away any formatting that could have been copied over from another program, such as HTML Tags, Microsoft Word Formatting, Cascading Style Sheets, Font Tags, and Span Tags. For best results, hold down Ctrl + A to select all text, then click the Format Stripper button, and select which formatting you would like to remove.

• Image Manager - This button allows an agent to insert an image into a KB article.

• Flash Manager - This button allows an agent to insert flash into a KB article.

• Media Manager - This button allows an agent to insert a video or a movie clip into a KB article.

• Document Manager - This button allows an agent to insert a document into a KB article.

• Insert Code Block - This button allows an agent to format a string of code.

Note: After clicking the image, flash, media, or document button, a pop up box will appear and the agent must first choose a folder for the file to be inserted into. Then click the upload tab to browse files. Once the file is chosen, click the Browse Files tab and click the Insert button. A link will then be placed in the KB article.

Options

Mark as Private - Check this box if you only want agents to have the ability to view this article.

Mark as Draft - Check this box if you want another agent to review the article before it is made public.

Mark As Needs Review - Check this box if believe this article needs reviewed. It will still be available to be read publicly.

Statistics

This tab will not be used when creating a new article. Once the article has been made public, you can view this tab to see statistical analysis for this article.

Canned Replies

Canned Replies Overview

Canned Replies are a group of predefined responses to help agents respond to frequently asked questions quickly and efficiently. The canned replies page lists all of your responses in one place and can get grouped and organized by using root folders that you designate.

To get started, click the Knowledge button on the Main toolbar, then select the Canned Replies control bar from the left.

To see a list of your current Canned Replies, click Root from the left tree view. To add a new root folder, click the Green Plus Sign from the folders toolbar. To edit an existing Root folder, select the folder and then click the Pencil from the Folder toolbar.

While you are looking at a list of your Canned Replies, you will notice 5 icons across the Actions toolbar— New , Edit , Delete , Search , and Refresh .

New - This icon allows you to add a new canned reply.

Edit - This icon allows you to edit an existing canned reply.

Delete - This icon allows you to delete an existing canned reply.

Search - This icon allows you to search for a particular canned reply.

Refresh - This icon allows you to manually refresh the page.

Canned Replies are also classified by 3 different statuses— Drafts , Flagged for Review , and Stale Articles .

Drafts - These are replies prepared by an agent, but will not be available publicly until they have been read and marked reviewed by another agent.

Flagged for Review - These are replies that have been marked by an agent that the contents need reviewed. It is available to be viewed.

Stale Articles - These are replies that have not been used within a certain amount of time set by your system administrator.

Agents can also search through the Canned Replies by clicking Advanced Search from the left tree view and then filling out some or all of the following fields.

Search String - Enter the text string you wish to search for.

Date Range - Enter a date range you wish to search within.

Folder - Select the specific folder you would like to search from the drop down list.

Owner - Select the group or individual from the drop down list that should be classified the owner of the reply.

Status - Select a specific status you would like to search from the drop down list.

Max Results - Select the maximum number of results you would like displayed from the drop down list.

Create a New Canned Reply

Agents can create new canned replies. To get started, click the Knowledge button from the main toolbar, then select New Canned Reply from the left tree view or click the New icon from the actions toolbar.

Once you do that, a new screen will pop up asking for the following information. No new information will be saved until you have clicked the Save icon in the upper left hand corner of the window.

Compose

Title - Enter the title of the new reply.

Folder - Choose a folder from the drop down list that you would like this reply to be placed.

Assign To - Choose a group or individual this reply should be assigned to.

Body - Enter the contents of the article in this area.

Options

Mark as Draft - Check this box if you want another agent to review the article before it is made public.

Mark As Needs Review - Check this box if believe this article needs reviewed. It will still be available to be read publicly.

Statistics

This tab will not be used when creating a new article. Once the article has been made public, you can view this tab to see statistical analysis for this article.

News

News Overview

A News Item is a brief explanation of current or upcoming events for your organization. The News page lists all of your News Items in one place.

To get started, click the Knowledge button on the Main toolbar, then select the News control bar from the left. To see a list of your current News Item, click All Items from the left tree view.

While you are looking at a list of your News Items, you will notice 5 icons across the Actions toolbar— New , Edit , Delete , Search , and Refresh .

New - This icon allows you to add a news item.

Edit - This icon allows you to edit an existing news item.

Delete - This icon allows you to delete an existing news item.

Search - This icon allows you to search for a particular news item.

Refresh - This icon allows you to manually refresh the page.

News Items are also classified by 2 different statuses— Drafts , and Flagged for Review .

Drafts - These are articles prepared by an agent, but will not be available publicly until they have been read and marked reviewed by another agent.

Flagged for Review - These are articles that have been marked by an agent that the contents need reviewed. It is available to be viewed.

Agents can also search through the Knowledge Base articles by clicking Advanced Search from the left tree view and then filling out some or all of the following fields.

Search String - Enter the text string you wish to search for.

Date Range - Enter a date range you wish to search within.

Status - Select a specific status you would like to search from the drop down list.

Max Results - Select the maximum number of results you would like displayed from the drop down list.

Create a News Item

Agents can create a new item to be added to the News area of the Portal. To get started, click the Knowledge button from the main toolbar, then select New Item from the left tree view or click the New icon from the actions toolbar.

Once you do that, a new screen will pop up asking for the following information. No new information will be saved until you have clicked the Save icon in the upper left hand corner of the window.

Compose

Title - Enter the title of the news item.

Date - Enter the date and time you would like the News Item to be displayed, or use the calendar and clock to help aid with that.

Summary - Write a brief summary of the News Item.

Body - Enter the contents of the News Item in this area.

Tool Bar - In addition to standard text formatting tools, the News Item creation tool bar includes the following to strip formatting, insert images, flash, videos, documents, and code blocks into News Items:

- Format Stripper - This button allow an agent to take away any formatting that could have been copied over from another program, such as HTML Tags, Microsoft Word Formatting, Cascading Style Sheets, Font Tags, and Span Tags. For best results, hold down Ctrl + A to select all text, then click the Format Stripper button, and select which formatting you would like to remove.
- Image Manager - This button allows an agent to insert an image into a News Item.
- Flash Manager - This button allows an agent to insert flash into a News Item.
- Media Manager - This button allows an agent to insert a video or a movie clip into a News Item.
- Document Manager - This button allows an agent to insert a document into a News Item.
- Insert Code Block - This button allows an agent to format a string of code within a News Item.

Note: After clicking the image, flash, media, or document button, a pop up box will appear and the agent must first choose a folder for the file to be inserted to. Then click the upload tab to browse files. Once the file is chosen, click the Browse Files tab and click the Insert button. A link will then be placed in the News Item.

Options

Mark as Private - Check this box if you only want agents to have the ability to view this news item.

Mark as Draft - Check this box if you want another agent to review the news item before it is made public.

Mark As Needs Review - Check this box if believe this news item needs reviewed. It will still be available to be read publicly.

Statistics

This tab will not be used when creating a news item. Once the news item has been made public, you can view this tab to see statistical analysis for this news item.

Settings

Preferences

The Preferences page gives an agent the ability to determine the settings for their account.

To get started, click the Settings button on the main toolbar, then select Preferences from the My Settings folder in the left tree view. No settings are saved until you click the Save icon in the upper left hand corner of the Actions toolbar.

User

Username - This is the username an agent will use to log in with, and will be known as throughout the system.

Authentication - Choose the method you would like SmarterTrack to authenticate agents against.

Change Password - Enter a new password here if you would like to change it.

Confirm Password - Re-enter the password to verify the change.

Email Address - This is the email which will be associated to the specific agent.

Display Name - This is the name that you want displayed with this agent.

Time Zone - Choose the time zone that you wish to use in SmarterTrack.

Avatar - This is the avatar that will be displayed within the chat window.

New Avatar - This gives you the opportunity to change your avatar.

Agent Options

Hourly Cost - Enter an hourly cost for the agent.

Items per Page - Enter the total number of items (tickets, chats, etc.) that will be displayed per page.

Compose Font - Select a font and size from the drop down list that will be used when working with tickets and chats.

Enable automatic popup when new reminders occur - Enable this to have new reminders shown in a popup window.

Tickets

Reply Mode - Choose to use a popup window or use the main window when replying to a ticket.

Forward To - Enable this and enter an email address if you would like ticket responses forwarded.

Allow Replies From - Enter an email address that you will allow replies from.

Alert To - Enter an email address that you would alerts sent to.

Enable waiting ticket counters in left tree - Enable this to have the total number of tickets displayed next to "waiting for customer".

Include waiting tickets in root tree item counts - Check this box to have waiting tickets included in the total number of tickets for an agent.

Live Chat

Chat Reply Mode - Choose to use a popup window or use the main window when replying to chats.

Display Name for Chat - Enter the name you would like displayed in the chat window.

Max Simultaneous Chats - This is the number of chat windows that can be open and running at the same time.

Enable WhosOn View - Enable this for the agent to see the WhosOn tree view.

Enable Page Pushing - Enable this for the agent to have the ability to push Web pages to customers during Live Chats.

Enable Automatic New Chat Popup - Enable this to have new chats displayed as a popup window.

Enable From Name on Invitations - Enable this to have the name of the agent displayed when they are initiating a new chat.

Enable Chat Notification Sounds - Enable this to have a sound notify an agent when a customer makes a response during a Live Chat.

Enable "Chat in Queue" Notification Sound - Enable this to have agents alerted by sound when a Live Chat is in the queue.

Chat Welcome Message - Enter a message you would like displayed when an agent first enters chat.

Default Invitation Message - Enter the default message you want to send when issuing invitations to chat.

Signature

Add text to this area that will display at the bottom of each ticket when replying.

Help for Administrators

Manage

All Active Groups

All active groups is broken into two separate pages—Active Ticket Groups and Active Chat Groups. These pages give the system administrator the ability to see a list of all agents, the status of the agent, the number of tickets the agent currently has in their possession, the number of active ticket or chat groups, and the total number of ticket or chat groups the agent is a member of.

To get started, click the Manage button from the main toolbar, then select Active Ticket Groups (to edit ticket groups for an agent) or Active Chat Groups (to edit chat groups for an agent) from the left tree view.

To change the status of an agent, select the agent and click the Edit icon from the actions toolbar, or double click a specific agent. (For more information on Agent Status, look at the Agent Status help page in Help for Agents.)

Global Tickets

The global tickets page gives the system administrator the ability to view tickets that are in the SmarterTrack system, which includes—Active status, Waiting status, Closed status, Deleted Tickets, and Spam Tickets.

To get started, click the Manage button from the actions toolbar. For information on the actions that can be performed with a ticket, see the Workspace folder in Help for Agents.

Deleted Tickets

The Deleted Tickets page is a list of all tickets that have been deleted by the agents within the organization. To see your deleted tickets, click the Manage button on the main toolbar, then select Deleted Tickets from the left tree view. Administrators will see the following icons—Purge, Undelete, and Search.

Purge - This icon will permanently delete all selected tickets. This option is only available to system administrators.

Undelete - This icon will move the ticket to the active state and assign it to the agent that originally deleted it.

Search - This icon will search tickets within the current page. (For more information on searching, look at the My Ticket Overview page in the Workspace folder of Help for Agents.)

Spam Tickets

The Spam Tickets page is a list of all tickets that have been marked as spam by the agents within the organization. To see your spam tickets, click the Manage button on the main toolbar, then select Spam Tickets from the left tree view. Administrators will see the following icons—Purge, Undelete, and Search.

Purge - This icon will permanently delete all selected tickets. This option is only available to system administrators.

Undelete - This icon will move the ticket to the active state and assign it to the agent that originally marked it as spam.

Search - This icon will search tickets within the current page. (For more information on searching, look at the My Ticket Overview page in the Workspace folder of Help for Agents.)

Global Chats

The global chats page gives the system administrator the ability to view chats that are in the SmarterTrack system, which include—Active status, Inactive status, and Deleted Chats.

To get started, click the Manage button from the actions toolbar. For information on the actions that can be performed with a chat, see the Workspace folder in Help for Agents.

Coaching and Co-chats

System Administrators also have the ability to coach an agent while that agent is engaged in a chat and/or participate simutaneously with that agent in a chat.

The System Administrator must first click on an active chat from the global chats tree view. The bottom pane will be divided into two parts—one which consists of the current chat that the system administrator can activly participate in and the other which reads "Type below to coach agent" and gives system administrators the opportunity to give the agent advice without the customer being aware.

Deleted Chats

The Deleted Chats page is a list of all chats that have been deleted by the agents within the organization. To see your deleted chats, click the Manage button on the main toolbar, then select

Deleted Chats from the left tree view. Administrators will see the following icons—Purge, Undelete, and Search.

Purge - This icon will permanently delete all selected chats. This option is only available to system administrators.

Undelete - This icon will move the chat to the active state and assign it to the agent that originally deleted it.

Search - This icon will search chats within the current page. (For more information on searching, look at the My Chat Overview page in the Workspace folder of Help for Agents.)

Settings

My Settings

Preferences

The Preferences page gives an agent/administrator the ability to determine the settings for their account.

To get started, click the Settings button on the main toolbar, then select Preferences from the My Settings folder in the left tree view. No settings are saved until you click the Save icon in the upper left hand corner of the Actions toolbar.

User

Username - This is the username an agent will use to log in with, and will be known as throughout the system.

Authentication - Choose the method you would like SmarterTrack to authenticate agents against.

Email Address - This is the email which will be associated to the specific agent.

Display Name - This is the name that you want displayed with this agent.

Time Zone - Choose the time zone that you wish to use in SmarterTrack.

Avatar - This is the avatar that will be displayed within the chat window.

New Avatar - This gives you the opportunity to change your avatar.

Enable Registered User Role - Enable this to give the user Registered User capabilities.

Enable Agent Role - Enable this to give the user Agent capabilities.

Enable System Administrator Role - Enable this to give the user System Administrator capabilities.

Enable Database Administrator Role - Enable this to give the user Database Administrator capabilities.

Agent

Hourly Cost - Enter the hourly cost associated for this agent to work with tickets and chats.

Items per Page - This is the number of items (tickets, chats, etc.) that will be displayed per page.

Compose Font - This is the font that will be used when working with tickets and chats.

Reply Mode - Choose to use a popup window or use the main window when replying to a ticket.

Forward To - Enable this and enter an email address if you would like ticket responses forwarded.

Allow Replies From - Enter an email address that you will allow replies from.

Alert To - Enter an email address that you would alerts sent to.

Tickets

Enable waiting ticket counters in left tree - Enable this to have the total number of tickets displayed next to "waiting for customer".

Include waiting tickets in root tree item counts - Check this box to have waiting tickets included in the total number of tickets for an agent.

Live Chat

Chat Reply Mode - Choose to use a popup window or use the main window when replying to chats.

Display Name for Chat - This is the name you would like displayed in the chat window.

Max Simultaneous Chats - This is the number of chat windows that can be open and running consecutively.

Enable WhosOn View - Enable this for the agent to see the WhosOn tree view.

Enable Page Pushing - Enable this for the agent to have the ability to push Web pages to customers during Live Chats.

Enable Automatic New Chat Popup - Enable this to have new chats displayed as a popup window.

Enable From Name on Invitations - Enable this to have the name of the agent displayed when they are initiating a new chat.

Enable Chat Notification Sounds - Enable this to have a sound notify an agent when a customer makes a response during a Live Chat.

Enable "Chat in Queue" Notification Sound - Enable this to have agents alerted by sound when a Live Chat is in the queue.

Chat Welcome Message - Enter a message you would like displayed when a customer first enters chat.

Default Invitation Message - Enter the default message you want to send when issuing invitations to chat.

Signature

Add text to this area that will display at the bottom of each ticket when replying.

Notification Profiles

Customize notification profiles by assigning events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the My Settings folder tree view.

The Notification Profiles page lists all of your profiles and lets you perform many actions, like adding a new profile, edit, or delete.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Notification Profile Name - This can be any name that will help you recognize this profile.
- Email Address(es) - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email Address(es) - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

System Settings

Database Settings

Note: This page is ONLY available to the primary system administrator and users with the Database Administrator Role.

The settings below are used to configure your SmarterTrack installation to connect to an existing database. Please note that SmarterTrack will not operate until you create a database and then attach SmarterTrack to it with this page. The initial settings will be completed during the installation wizard, but can be modified here.

To get started, click the Settings button from the main toolbar, then select Database Settings from the System Settings in the left tree view.

Server Type - Select you server type from the drop down list.

Server Name - Enter the name of the server that the database is on.

Authentication - Select the authentication method you would like to use from the drop down list.

Username - Enter the username for the database.

Password - Enter the password for the database.

Catalog Name - Enter the name of the database.

Table Name Prefix - Enter the prefix you want associated with the database. Most cases this should be left as the default value: "st_"

General Settings

This page contains general global settings for your instance of SmarterTrack. Any changes you make on this screen are effective across your entire SmarterTrack installation.

To get started, click the Settings button from the main toolbar, then select General Settings from the System Settings in the left tree view.

General

SmarterTrack Base URL - Enter the URL for the main page of SmarterTrack.

Company Name - Enter your company name.

Currency Format - Enter the format you want currency displayed throughout SmarterTrack.

Spell-Check Dictionary - Choose from the drop down list the dictionary you would like to use.

Business Days - Check the days your business is open.

Business Hours Start - Enter the time your business opens.

Business Hours End - Enter the time your business closes.

Default Skin - Choose from the drop down list which skin you would like to set as a default.

Default Time Zone - Choose from the drop down list the default time zone for your company.

Enable skin overrides for agents - Enable this if you want to give your agents the ability to change interface skins.

Maps

To configure Microsoft Virtual Earth as your map provider:

- Choose Microsoft Virtual Earth as the Map Provider
- Check the Enabled box
- The default URL should work in almost all cases. It is provided in case Microsoft changes it and you need to change it
- Click Save the save icon from the action tool bar

To configure Google Maps as your map provider:

- Choose Google Maps as the Map Provider
- Check the Enabled box
- The default URL should work in almost all cases. It is provided in case Microsoft changes it and you need to change it
- Click on "Obtain a Key" and fill out the form on Google's Site, inserting the URL of your SmarterTrack installation
- Click Generate API Key, and copy the contents of the "Your key is:" box
- Paste the key into the Provider Key field in SmarterTrack
- Click the Save icon from the actions tool bar

Customer Portal

This page contains all the settings needed to customize your company's portal. The portal will be used by your agents and customers to access SmarterTrack.

To get started, click the Settings button from the main toolbar, then select Customer Portal from the System Settings folder in the left tree view.

Options

Portal Title - Enter a title for the portal that will be displayed on the main log in page.

Authentication - Choose from the drop down list of how you want users and agents to be authenticated.

Knowledge Base - Choose from the drop down list who you want to have access to the Knowledge Base articles.

News System - Choose from the drop down list who you want to have access to the News System.

Items Stale After - Enter the number of days that a KB article will become stale if it has not been reviewed in that time.

Enable new user registration in Customer Portal - Enable this to have the registration icon available to in the Customer Portal.

Require visitors to pass CAPTCHA when registering - Enable this to require new registering visitors to pass CAPTCHA test.

Branding

Logo Navigate URL - Enter a URL here that if your logo is clicked on, the user will be taken to.

Company Logo - This is the current logo that has been chosen.

New Logo - Use this to choose a new logo to be displayed.

Enable logo on the customer portal - Enable this to have the logo displayed on the Portal

Custom Links

This tab will allow you to add custom links to your main portal page. To add a new link, click the Add Link from the Actions toolbar.

To edit a link, click the Edit icon from the Actions toolbar or double-click a specific link.

To delete a link, click the Delete icon from the Actions toolbar.

Link Title - Enter the name of the link. This is what will be displayed on the Customer Portal.

Description - Enter a short description of what the link will do.

Display Order - Enter a number here, which will determine where that link is placed.

Link URL - Enter the URL of where the link will take the user.

Link Target - Choose from the drop down box how you want that page displayed once a user clicks the link.

Current Icon - This is the icon that will be associated with the link.

New Icon - This gives you the opportunity to choose a new icon.

Role Required - Choose from the drop down list of what role is required to see this link.

Enable in Customer portal - Enable this to have the link displayed on the customer portal.

Departments

Departments represent separate areas of an organization. Typically, each department will have its own email address, such as: support@example.com or sales@example.com.

This page will list all departments that are currently available to your organization, and also gives you the ability to add new departments and/or edit/delete existing departments.

To get started, click the Settings button from the main toolbar, then select Departments from the System Settings folder in the left tree view.

To add a new department, click the New icon from the actions toolbar, and then complete the following information. No new information will be saved until you have clicked the Save icon on the actions toolbar.

To edit a department, click the Edit icon from the Actions toolbar or double-click a specific department.

To delete a department, click the Delete icon from the Actions toolbar.

Options

Department Name - Enter the name of the department. (ex. Sales, support, billing)

Front Line Group Name - Enter the name of the front-line group for this department.

Restrict ticket and chat viewing to group members and administrators only - Choose this option if the department should be treated with privacy, such as a billing department. Agents who do not belong to the department will not be able to see items in this department.

Tickets

Tickets Require Role - Choose from the drop down list of who can generate a ticket within that department.

Ticket Template - Choose from the drop down list what ticket template you would like to use for this department

Auto-Close After - Enable this and enter the number of hours you would like tickets to automatically close for this department.

Auto-Delete After - Enable this and enter the number of days you would like tickets to automatically be deleted for this department.

Auto-Purge Tickets After - Enable this and enter the number of days you would like tickets to automatically be purged for this department.

Auto-Purge Spam After - Enable this and enter the number of days you would like tickets marked as spam automatically purged for this department.

Enable ticket starting for only users who have verified email addresses - Enable this if you only want verified users to have the ability to generate new tickets.

Enable tickets to be started in the customer portal - Enable this to allow tickets to be generated through the Customer Portal for this department.

Send notification to customer when ticket is auto-closed - Check this to have an email to sent to a customer when their ticket is automatically closed.

Include tickets with resolutions in auto-delete - Check this to have tickets with resolutions included when it reaches the days set for auto-deletion.

Live Chat

Enable Live Chat - Enable this to have live chat available for this department.

Chat Template - Select the template you would like to use from the drop down list for this department.

Wait Time in Queue - Enter the number of seconds you want a chat to be in the queue before it is distributed to an agent, or is given one of the canned messages.

Variables - These are the variables available to be used in your messages.

"Estimated Wait Time" Message - Enter a message here that you want customers to see alerting them of their wait time to chat with an agent.

"No Agents Available" Message - Enter a message here telling customers that no agents are available for chat.

SMTP

Email Address - Enter the email address to retrieve mail from for this department.

Friendly Name - Enter the name that you want attached to the email address with all replies.

Server Name - Enter the server name or IP on which the email account resides.

Server Port - Enter the port on which the server resides.

Email Username - Enter the login username for the email account. Some mail servers may require a full email address in this field.

Email Password - Enter the password attached to the email account.

Enable SMTP Authentication - Enable this if your email domain requires SMTP authentication.

POP

Server Name - Enter the server name or IP on which the email account resides.

Server Port - Enter the port on which the server resides.

Login Username - Enter the login username for the email account. Some mail servers may require a full email address in this field.

Login Password - Enter the password attached to the email account.

Import Frequency - Enter the number of minutes you want SmarterTrack to check your POP account.

Enable POP Ticket Importing - Enable this to connect this department to an email account. Note: All email in that account will be downloaded and removed from the email account.

Allow new tickets to be submitted through POP - Check this box to allow new tickets to be generated through your POP account.

Auto-Responder

KB Search Results Max - Enter the maximum number of KB articles you want displayed

KB Search Folder - Select which folder from the drop down list that you want the KB articles pulled from.

View Ticket Online Text -

Enable Auto-Responder - Enable this to have the auto-responder message you type to be sent in response to all new tickets.

Message - Type the message for the auto-response.

Groups

Groups represent division in specific departments. 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.

This page will list all the groups that are currently available to your organization, and also gives you the ability to add new groups and/or edit/delete existing groups.

To get started, click the Settings button from the main toolbar, then select Groups from the System Settings folder in the left tree view.

To add a new group, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a group, click the Edit icon from the Actions toolbar or double-click a specific group.

To delete a group, click the Delete icon from the Actions toolbar.

Options

Department - Select the department from the drop down list that you would like this group associated with.

Group Name - Enter the name you like to name this group (ex. Level 1, management).

Ticket Distribution Method - Select from the drop down menu the method you want tickets distribute among agents. For more information see Ticket Distribution Methods.

Alert Option - Select the type of alert you prefer.

Alert Address - Enter the email you would like your alerts sent to.

Users

This tab gives you the ability to add, edit, and delete users from this particular group. To add a new user, click the Add User icon from the actions toolbar, and complete the following information.

Group Name - This will display the group name that you are adding your user to.

Agent - Select the user from the drop down list that you want added to your group.

Workload Weight - Select the ticket weight from the drop down list that you want associated with this agent.

Auto-Logout - Select the timeframe for which the agent will be automatically logged out of the system if they become inactive.

Handoff Tickets on Auto-Logout - Check this box if you want the agents tickets to be automatically handed off to another agent if they are automatically logged out.

Alert Administrator on Auto-Logout - Check this box to have the system administrator alerted if this user it automatically logged off.

Enable Live Chat - Enable this to have live chat available for the agent.

Ticket Time Estimates

This tab gives you the ability to associate specific times with certain tasks performed in SmarterTrack. This will be helpful when using cost analysis reports.

Ticket Created - Enter the number of minutes it will take for an agent to generate a ticket.

Ticket Transferred - Enter the number of minutes it will take an agent to receive a ticket from another agent and then process the information within the ticket.

Ticket Incoming Message - Enter the number of minutes it will take an agent to receive a new ticket and then process the information within the ticket.

Ticket Outgoing Message - Enter the number of minutes it will take an agent to compose a reply to a ticket and send it.

Chat Time Estimates

This tab gives you the ability to associate specific times with certain tasks performed in SmarterTrack. This will be helpful when using cost analysis reports.

Chat Created - Enter the number of minutes it will take for an agent to generate a chat.

Chat Transferred - Enter the number of minutes it will take an agent to receive a chat from another agent and then process the information within the chat.

Chat Incoming Message - Enter the number of minutes it will take an agent to receive a new chat and then process the information within the chat.

Chat Outgoing Message - Enter the number of minutes it will take an agent to compose a reply to a chat.

Agents

Employees within an organization that deal with customer emails should be created as agents in SmarterTrack.

This page will list all the agents that are currently available to your organization, and also gives you the ability to add new agents and/or edit/delete existing agents.

To get started, click the Settings button from the main toolbar, then select Agents from the System Settings folder in the left tree view.

To add a new agent, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit an agent, click the Edit icon from the Actions toolbar or double-click a specific agent.

To delete an agent, click the Delete icon from the Actions toolbar.

Users

This page will list all the users that are currently available to your organization, and also gives you the ability to add new users and/or edit/delete existing users.

To get started, click the Settings button from the main toolbar, then select Users from the System Settings folder in the left tree view.

To add a new user, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a user, click the Edit icon from the Actions toolbar or double-click a specific user.

To delete a user, click the Delete icon from the Actions toolbar.

Users

Username - This is the username an agent will use to log in with, and will be known as throughout the system.

Authentication - Choose the method you would like SmarterTrack to authenticate agents against.

Email Address - This is the email which will be associated to the specific agent.

Display Name - This is the name that you want displayed with this agent.

Skin - Choose from the drop down list the skin that you wanted used for SmarterTrack.

Time Zone - Choose the time zone that you wish to use in SmarterTrack.

Avatar - This is the avatar that will be displayed within the chat window.

New Avatar - This gives you the opportunity to change your avatar.

Enable Registered User Role - Enable this to give the user Registered User capabilities.

Enable Agent Role - Enable this to give the user Agent capabilities.

Enable System Administrator Role - Enable this to give the user System Administrator capabilities.

Enable Database Administrator Role - Enable this to give the user Database Administrator capabilities.

Agent

Hourly Cost - Enter the hourly cost associated for this agent to work with tickets and chats.

Items per Page - This is the number of items (tickets, chats, etc.) that will be displayed per page.

Compose Font - This is the font that will be used when working with tickets and chats.

Enable automatic popup when new reminders occur - Enable this to have new reminders show in a popup window.

Tickets

Reply Mode - Choose to use a popup window or use the main window when replying to a ticket.

Forward To - Enable this and enter an email address if you would like ticket responses forwarded.

Allow Replies From - Enter an email address that you will allow replies from.

Alert To - Enter an email address that you would alerts sent to.

Enable waiting ticket counters in left tree - Enable this to show a count of tickets in the "waiting for customer" queue.

Include waiting tickets in root tree item counts - Enable this to have waiting tickets includes in an agents total ticket count.

Live Chat

Chat Reply Mode - Choose to use a popup window or use the main window when replying to chats.

Display Name for Chat - This is the name you would like displayed in the chat window.

Max Simultaneous Chats - This is the number of chat windows that can be open and running consecutively.

Enable WhosOn View - Enable this to give agents the ability to see the WhosOn tree view.

Enable Page Pushing - Enable this to give agents the ability to push pages to customers during a chat.

Enable Automatic New Chat Popup - Enable this to have new chats displayed in a popup window.

Enable From Name on Invitations - Enable this to have the agents name initiating the chat shown on the chat.

Enable Chat Notification Sounds - Enable this to have sounds activated when a chat message is received.

Enable "Chat in Queue" Notification Sound - Enable this to have sounds activated when a chat reaches the queue.

Chat Welcome Message - Enter a message you would like displayed when a customer first enters chat.

Signature

Add text to this area that will display at the bottom of each ticket when replying.

Live Chat Settings

This page allows you to set specific parameters relating to live chat.

To get started, click the Settings button from the main toolbar, then select Chat Settings from the System Settings folder in the left tree view. No new information will be saved until you click the Save icon from the actions toolbar.

Options

Live Chat Requires - Select which roles from the drop down list that have permission to access live chat.

Distribution Method - Select from the drop down menu the method chats should be distributed among agents. For more information, see Chat Distribution Methods.

Handoff if No Response - Enable this and enter the number of minutes a customer will wait for an available agent before it is handed off to another agent.

Disable chat outside of business hours - Check this to not allow chat outside of regular business hours.

Queue

Sound Notifications - Select from the drop down menu how often a reminder sound should be heard when a chat is in the queue.

Unanswered Chats

Sound Notifications - Select from the drop down menu how often a reminder sound should be heard when a chat has gone unanswered.

Warning Level

Sound Notifications - Select from the drop down menu how often a reminder sound should be heard when a chat has reached the warning idle threshold.

Warning Idle Threshold - Enter the number of seconds an unanswered chat has before it is considered the warning level.

Critical Level

Sound Notifications - Select from the drop down menu how often a reminder sound should be heard when a chat has reached the critical idle threshold.

Critical Idle Threshold - Enter the number of seconds an unanswered chat has before it is considered the critical level.

WhosOn

Options

WhosOn enables you to view the activity of Website visitors on the Customer Portal and on your

Website(s). It also allows you to proactively communicate with site visitors by inviting or forcing them to a chat session.

To configure WhosOn to SmarterTrack and enable communication with visitors to SmarterTrack's Portal:

• Click the Settings button from the main tool bar
• Select WhosOn Settings from the System Settings folder in the left tree view
• Purge Idle Users - Enter the number of minutes a user can be idle before they purged from the WhosOn page
• Purge Removed Users - Enter the number of minutes or seconds a user has to start a new session before they are purged.
• Purge Pending Users - Enter the number of minutes or seconds a pending user has before they are purged.
• Invitation Ignored - Enter the number of minutes or seconds the chat window will disappear from the user's screen if they have not responded to the invitation.
• Invitation Horizontal Alignment - Select from the drop down box the location the chat invitation window will appear.
• Invitation Horizontal Offset - Enter the number of pixels the chat invitation box should be horizontally offset.
• Invitation Vertical Alignment - Select from the drop down box the location the chat invitation window will appear.
• Invitation Vertical Offset - Enter the number of pixels the chat invitation box should be vertically offset.
• Enable Tracking Script on Portal - Enable this to track users that visit SmarterTrack's Customer Portal.
• Enable Absolute Page Position on Invitations - Enable this so that the invitation chat window appears in the location that was configured above.
• Click the Save icon from the actions tool bar to save all settings
• Go to each agent you want to be able to see WhosOn, go to the Live Chat tab, and make sure "Enable WhosOn View" is checked.

As visitors hit your portal, they will show up in the WhosOn list. Agents can watch this list and push chats to them if the agent belongs to a group that allows chat.

To configure WhosOn to track and enable communication with visitors on other web sites:

• Click the Settings button on the main tool bar
• Select WhosOn Settings from the System Settings folder in the left tree view
• Click on the Generate icon from the actions tool bar to generate the tracking script for your

site, and choose HTTP or HTTPS.

• Copy the script exactly as written out of the Tracking Script box

• Paste the script into your web site right above the end body tag (to prevent it from slowing down your site at all)

• Click the Save icon from the actions tool bar to save all settings

• Go to each agent you want to be able to see WhosOn, go to the Live Chat tab, and make sure "Enable WhosOn View" is checked.

SmarterTrack will then start tracking visitors to your web site and show them to agents.

Filters

You may find that you want to segregate site visitors into one or more groups based on where they are on your site. This can be accomplished using WhosOn filters.

To add a WhosOn Filter:

• Click the Settings button from the main tool bar

• Select WhosOn Settings from the System Settings folder in the left tree view

• Click on the Filters Tab

• Create a new filter by clicking on the New icon from the actions tool bar

• Enter a friendly name for the filter that will show up in the left tree

• Enter the page filter criteria that will be used to trigger the filter. This may be part of a URL or an entire URL.

• Check the Enable Filter box

• Click the Save icon from the actions tool bar to save all settings

For example, you may want to separate traffic in your forum from traffic in your order page. You can create one filter with "forums" and another with "Order" to separate the two (assuming your site was set up this way, of course).

This allows you to quickly and easily target certain types of visitors (certain products, etc) and push relevant chat invitations to them.

Working in WhosOn

While viewing WhosOn, different people will have different ideas of important things to view. Click on the column selector box at the top right corner of the grid to customize the columns that you would like to have shown on the page. These include page and site referrers, geographic location, language, host domain, and any other potential columns (below are a list of possible column headers and their definitions).

To invite the visitor to chat with you, click on the Chat icon from the actions tool bar, and choose Invite to Chat. Enter a message and choose what department the chat should be tracked with, and click on OK. (This message can be customized in agent settings) The customer will then receive an invitation and can either accept or reject the chat invitation. They may also choose to ignore the chat invitation and continue browsing the site. The status of the invitation can be seen if you enable the Chat Status column.

To force a chat to begin with the user without enabling them to accept it or reject it, click on the Chat icon from the actions tool bar and choose Force to Chat. Be aware that not giving the site visitor a choice in the matter is typically not considered good etiquette, but there are times when it is useful.

The Remove icon is used to remove a person from the WhosOn list and places them in the Removed Users filter. This will temporarily remove them from your list until the timeframe specified in WhosOn Settings page.

The following terms are possible columns for WhosOn:

• Tracking Status Icon - This will display if a customer is active, pending, or inactive with the use of a symbol.
• Tracking status Text - This will list if a customer is active, pending, or inactive.
• IP Address - This will display the IP Address of the customer.
• Visitor ID - This will display the ID of the customer that is uniquely assigned by SmarterTrack.
• Host Names - This will display the host name of the customer, similar to IP Address.
• Host Domain - This will display the host domain of the customer, similar to IP Address.
• Session Started (time) - This will display the time the customer started their session on your Website.
• Hits - This displays the total number of times the customer has hit on your Website within that same session.
• Duration (time) - This will display that amount of time the customer has been on your Website.
• Idle (time) - This will display the amount of time the customer has been idle on your Website.
• City - This will display the city the customer is viewing your Website from.
• Region - This will display the region (state) the customer is viewing your Website from.
• Country - This will display the country the customer is viewing your Website from.
• Language - This will display the language of the browser the customer is using.
• Language with Locale - This will display the language of the customer's browser with the area they are in.
• Browser - This will display the browser the customer is using.

• Operating System - This will display the operating system the customer is using.

• Chat Status - This will display the current chat status of the customer.

• Initial Page - This will display the initial page the customer lands on when arriving to your Website.

• Initial Virtual Page - This will display the initial virtual page the customer lands on when arriving to your Website. Virtual pages are configured by your System Administrator.

• Initial Page Title - This will display the initial page title that the customer lands on when first arriving to your Website.

• Initial Referrer - This will display the referring page that got the customer to your Website.

• Current Page - This will display the page the customer is currently on.

• Current Virtual Page - This will display the virtual page the customer is currently on. Virtual pages are configured by your System Administrator.

• Current Page Title - This will display the title of the page the customer is currently on.

• Current Referrer - This will display the page that referred the customer to the page they are currently on.

• Chat Invites Rejected - This will display the number of times the customer rejected a chat from an agent.

• Chat Invites Accepted - This will display the number of times the customer accepted a chat from an agent.

• Chat Invites Ignored - This will display the number of time the customer ignored a chat from an agent.

• Chats Forced - This will display the number of times the customer was sent a "forced" chat by an agent.

• Invitation Last Sent Date - This will display the date of the last time the customer was sent a chat invite by an agent.

• Last Chat Date - This will display the date of the last time the customer was involved in a chat.

• First Chat Date - This will display the date of the first time the customer was involved in a chat.

• Last Agent to Chat - This will display the username of the agent to last chat with the customer.

• Last Group to Chat - This will display the last group that chatted with the customer.

• Last Department to Chat - This will display the last department that chatted with the customer.

Ticket Settings

This page gives you the ability to set specific parameters relating to tickets.

To get started, click the Settings button from the main toolbar, then select Ticket Settings from the System Settings folder in the left tree view. No new information will be saved until you click the Save icon from the actions toolbar.

Options

View Ticket Requires - Select which roles from the drop down list that have permission to access view tickets.

New Ticket Requires - Select which roles from the drop down list that have permission to generate new tickets.

Email Send Mode - Select which format from the drop down list you want emails sent as—HTML or Plain Text.

Default Encoding - Select which encoding format from the drop down list you want.

Messages to Include in Replies - Enter the number of previous messages that will be included when replying to a ticket.

Delete failed emails after - Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder. After this many days, the files will be removed.

Reply Line Prefix - When replies are sent, the email that is being replied to is quoted. This string is inserted at the beginning of every line of the quoted email. This option applies to plain-text email only.

Ticket distribution - This is the default method used to assign tickets. For more information, see Ticket Distribution Methods.

Max Raw Content Files - This is the max number of files that will be kept before the oldest files start to get deleted. Default is set at 25,000 and it is recommended to keep at the default setting or lower.

Enable CAPTCHA when submitting tickets - Enable this to require that a CAPTCHA be passed before new tickets can be submitted. CAPTCHAs are verification methods used to prevent automated systems from using your form.

Enable attachments when submitting tickets - Enable this to give users the ability to have an attachment when generating a new ticket.

Raw Content

Max Stored Per Email - The raw content storage for each email will be limited to this size.

Purge Raw Content After - Enter the number of days, files, and MB that raw content will be purged once the limit is exceeded. Raw content is useful if you need to refer to the original email headers, but is not required for the system to operate.

Maps

SmarterTrack adds support for live geographic mapping during chats with Google Maps and Microsoft Virtual Earth.

To configure Microsoft Virtual Earth as your map provider:

• Click the Settings button from the main tool bar
• Select General Settings from the System Settings folder in the left tree view
• Click on the Maps Tab
• Choose Microsoft Virtual Earth as the Map Provider
• Check the Enabled box
• The default URL should work in almost all cases. It is provided in case Microsoft changes it and you need to change it
• Click the Save icon from the action tool bar

To configure Google Maps as your map provider:

• Click the Settings button from the main tool bar
• Select General Settings from the System Settings folder in the left tree view
• Click on the Maps Tab
• Choose Google Maps as the Map Provider
• Check the Enabled box
• The default URL should work in almost all cases. It is provided in case Microsoft changes it and you need to change it
• Click on "Obtain a Key" and fill out the form on Google's Site, inserting the URL of your SmarterTrack installation
• Click Generate API Key, and copy the contents of the "Your key is:" box
• Paste the key into the Provider Key field in SmarterTrack
• Click the Save icon from the actions tool bar

To view maps within a chat:

• Click on an active or inactive chat to view it in the preview pane, or bring it up in a popup window
• Click on the Maps Tab
• If the location is known, the map will drill down to that location
• If the location is unknown, you will see the map at Earth level

Ticket Distribution Models

Overview

There are several different models that can be worked with for the distribution of tickets. In some companies, different models may be used in various groups. This document outlines the various working modes, and how SmarterTrack will meet the needs of each.

Working Models

A Ticket Distribution Method setting exists in each group in the system. This will allow the administrator to choose what method will be used. For simplicity, a default method can be chosen from the Ticket Settings page so it does not have to be set group-by-group.

These working models apply to NEW tickets and reassigned existing tickets only. In virtually all cases, if an agent is available for a follow-up response, it is assigned to them to allow for better communication.

Basic Round Robin

Typically, companies will choose this method to help ensure that everyone gets an equal share of work. Ticket weights do not take into consideration the amount of outstanding tickets a person has, but assigns tickets based on an equal load. Tickets will usually not be redistributed, although that can be optionally enabled.

Companies will typically employ this method if they have a sales team that works on commission. Using this method, all sales agents will receive the same number of potential leads. Using this method, agents will usually stay actively receiving tickets all of the time, even at night when they leave the office.

Tickets transferred DO NOT count as a ticket assigned. The counters update only on new tickets assigned.

Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to be reset back to the count of open and active tickets for each agent. This prevents people that are on vacation from getting 20 tickets when their day starts, but still allows the system to deal with agents that come in a few minutes late.

Service-Oriented

This working model is typically chosen in support departments and response-time centered groups. Typically, most front-line groups will use this method. Agents who work faster typically get more tickets, because this distribution method focuses on getting a fast response to the customer. Companies who use this method should use reporting to determine the workload being taken by each agent.

The system will assign tickets to agents based on the lowest ratio of (Open Tickets/Ticket Weight) to calculate the agent load. If two or more agents have the same ratio, the system will assign the ticket to the person who got assigned a new ticket the longest ago.

Each agent is set with a "maximum number of open tickets" setting that governs how much work can be in their box. Once their max value is reached, the system will not assign new tickets to that agent. Once all agents are full, the system will hold the tickets in the queue until space frees up.

A button to Get Tickets has been added to the Ticket List page that will pull the oldest message from the queue. For administrators looking at other agent's boxes, this option will show up as Push Tickets. Tickets will first attempt to be assigned that belong to the department or group that is selected in the left tree. If multiple groups have tickets that can be retrieved, the system will assign from the group that has received a ticket longest ago.

Cherry-Picking

This model is used by companies that want the absolute fastest response time and are not concerned with agents seeing all available tickets. This method puts a lot of trust in the staff to do their fair share and not just pick the easy tickets to do. Proper training is essential.

Using this model, no new tickets are assigned directly to agents (follow-up tickets are assigned as usual). All tickets go into the queue and are grabbed by staff members. The Get Tickets button can be added to allow them to easily grab a ticket from the queue without having to go searching for tickets, but agents can also look in the queue to find tickets to work on.

Configuring an event notification for when a ticket is sitting in the queue too long is very important in this working model.

Rebalancing

SmarterTrack 3.5 introduces some changes to the workflow for an agent, especially at the start of the day.

Before, when an agent came in to start the day, they'd get all tickets that the system had in the queue. Because of this, the next agent who logs in ended up not getting any tickets.

SmarterTrack will now track the last time a ticket is worked on by agents, and will temporarily hold a ticket to an agent when the agent so much as looks at a ticket. This temporary hold time is configurable by the administrator in the Ticket Settings -> Rebalance Rules page.

If the agent begins to write a response to the ticket, SmarterTrack will also temporarily hold the ticket to the agent for a period of time.

Starting in 3.5, when the second agent logs in, the system can be configured to automatically rebalance tickets. This tickets that have not been temporarily held to the first agent, are candidates to be redistributed among all of the agents. The system will attempt to group follow-up tickets with the original agents.

Since it can be confusing to agents if they are not prepared for it, rebalancing options will default to off. The administrator will also be able to add rebalancing rules that can depend on time of day or time intervals.

Chat Distribution Models

Overview

Two distinct working modes have been identified for chats, based on the type of company. An option exists in Settings -> Live Chat Settings to allow you to choose the type of working mode you wish to employ. These are explained below.

Cherry Picking

Cherry picking is basically the pattern where all chats go into a queue and are manually grabbed by agents performing chats. This model is typically preferred by small companies where any one of several agents may opt to take chats.

Using this model, chats are never assigned to agents automatically. Any action that would start a new chat or return a chat to the queue keeps the chat there until an agent takes the chat. The exception to this case is a chat transfer to a specific agent.

An alert will start notifying agents through sound when someone is in the queue waiting for a chat. The basic notification sound can be configured in the same manner as the other chat sounds.

If no agents are set to receive chats, the system will treat chat as offline.

Standard Round Robin

This is the more common scenario for chat distribution.

All agents have a maximum number of chats that they can take at once. When a new chat comes in, all agents that belong to that group are checked for their limit. Those that have chat slots available to fill are sorted by the factor of free space they have left and the last time they got a chat.

For example, assume a company has 3 agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to 5 chats at once. Joe and Bob are relatively new, and can handle 1 and 2 simultaneous chats at once.

Let us assume that nobody is chatting at the moment, and a new chat comes in. The system will generate a table such as the following in order to determine who should get the chat.

The system will first check to see who has the lowest % of capacity. It then takes the agents with the lowest value (which happens to be all three) and then takes the agent with the earliest Last Chat Ended time.

- Agents with lowest % of Capacity (0%): Sue, Bob, Joe
- Agent in that list with earliest Last Chat Ended: Joe

In this way the system tries to keep everyone with an equal percentage of the workload they share.

Advanced Settings

Quality Control

This quality control page gives you the ability to monitor agents for training purposes or regular quality control inspections.

This page will list all the agents that are currently being monitored, and also gives you the ability to add new agents to be monitored and/or edit/delete existing agents to be monitored.

To get started, click the Settings button from the Main toolbar, then select Quality Control from the Advanced Settings folder in the left tree view.

To add a new quality control measure, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a quality control measure, click the Edit icon from the Actions toolbar or double-click a specific quality control measure.

To delete a quality control measure, click the Delete icon from the Actions toolbar.

Agent - Select the agent from the drop down list that you would like to monitor.

Forward To - Enter the email address that you would like all replies forwarded to.

Frequency - Enter the frequency that you want replies forwarded.

Email Settings

This page will give you the ability to set up the email accounts that relate to this installation and operation of SmarterTrack.

To get started, click the Settings button from the Main toolbar, then select Email Settings from the Advanced Settings folder in the left tree view.

Error Notifications

Reporting Level - Select from the drop down list what type of notifications you would like to receive.

SMTP server - Enter the outgoing SMTP server name.

Email Address - Enter the email address to send messages from.

SMTP authentication - Enable this if SMTP Authentication is required to send mail from this email address.

Authentication username - Enter the appropriate SMTP username.

Authentication password - Enter the corresponding SMTP password.

Alert Emails

SMTP server - Enter the outgoing SMTP server name.

Email Address - Enter the email address to send messages from.

Friendly Name - Enter the name you want displayed when an email is sent.

SMTP authentication - Enable this if SMTP authentication is required to send mail from this email address.

Authentication username - Enter the appropriate SMTP username.

Authentication password - Enter the corresponding SMTP password.

Exclusions

Enter email addresses to exclude from automatic emails. Enter one email address per line.

Email Templates

Various emails are sent from SmarterTrack to customers, agents, and the administrator. Use the Email

Templates page to customize the appearance of these messages. Please be aware that due to your configuration, one or many templates may not be available.

To get started, click the Settings button from the Main toolbar, then select Email Templates from the Advanced Settings folder in the left tree view.

Editing a Template

To edit a template, double click the template, or click the Edit icon from the actions toolbar.

Template Name - Displays the name of the template you are editing.

Subject Line - The subject of the email that is sent.

Body - The message body is shown below the subject. If you wish to check the spelling, you may do so with the Spell Check link at the top of the page.

Variables - Shows a list of variables that can be used in the template.

External Providers

SmarterTrack provides several methods in order to integrate your existing customer data with SmarterTrack. These methods are:

- Web Services - Allow automation of common functions like creating tickets from your own application (control panel, web site, etc).
- Custom Field Searches - A quick method to set up a search in chat and ticket submission, if you use a SQL database.
- External Providers - SmarterTrack calls external providers to verify data and set custom fields. Use these to allow SmarterTrack to make requests of your own systems (billing, etc).

For information about Web Services or Custom Field Searches, please refer to the help topics "Automation with Web Services" and "Search Definitions"

Overview

There are several different external provider interfaces within SmarterTrack. Each of these can be implemented stand-alone or you can implement them all together. A sample application which can be used as a starting point for your own development efforts can be downloaded from here . This sample also provides documentation on the specifics of implementing the provider.

The common options to all providers are:

- Login Provider - Choose External Web Service if you will be implementing an external provider.

• Web Service URL - The URL, including http://, at which your web service is deployed. If the web service is based in ASP.Net, it should end with .asmx.
• Web Service Password - To secure your web services, it is recommended that you come up with a password that makes it so SmarterTrack and your web service can talk, but nobody else can call that web service. This password is passed into all external provider calls.

The individual external providers are explained below.

Login Provider

A login provider can be implemented that allows SmarterTrack to query your systems for user login, authentication, and creation. Every time a user logs in or returns to the site with a login already stored in their cookies, this provider is called.

Additional fields available for this provider are:

• Forgot Password URL - This field is optional. If you have a page on your own site where users can retrieve their password, input the URL in this field. This will show the Forgot Password link in the forum and pass the user to that page.
• Default Role for Users - Choose whether users are considered registered or anonymous after logging in. If you choose Anonymous, you will have to manually grant the user role to new users. Usually you will choose Registered User.
• Mark email addresses as verified - Choose whether new users (validated by the external provider) are automatically assumed as having verified email addresses or not.
• Enable single sign-on cookies from other sites - If you configure your web.config with the same authentication settings as your main web site (assuming it is written in .Net), a user signed into one place will automatically be validated in the other.

An external login provider implements the IExternalLoginProvider interface with the following functions:

• Authenticate - Called whenever a user logs in. In this function, check your own login data store to see if the credentials are okay and return OK or FAIL.
• GetSignInCookieInfo - Called when a user login needs refreshed in their cookies. User has already been authenticated. This is mostly so you can check to make sure the user should not be disabled because they got deleted from your database or they are no longer a customer, etc.

Custom Field Provider

A custom field provider can be implemented that allows custom fields to be shown and hidden on the fly while creating tickets and chats. The custom field provider is called when a ticket or chat is first being created, and allows you to add or pre-fill fields based on the user's login credentials or other information.

An external custom field provider implements the IExternalCustomFieldProvider interface with the following function:

- GetCustomFieldOptions - This function is called at two stages of the submit ticket/chat process. Use this function to modify what custom fields are available, and set whether the person can submit tickets or chats at all.

Ticket/Chat Provider

A ticket or chat provider can be implemented that permits you to store information about a submitted ticket and gives your system a last-chance opportunity to abort the new ticket or chat. You may implement this method to re-route requests with specific keywords or custom field values, or prioritize emails based on criteria.

An external ticket/chat provider implements the IExternalTicketProvider interface with one or both of these functions:

- StartChat - This function is called right when a user clicks on Submit to start a chat.
- StartTicket - This function is called right when a user clicks on Submit to start a ticket.

Summary

External Providers are a powerful way to make SmarterTrack integrate with your own systems. With them, you can do things such as:

- Integrate your login system to LDAP
- Copy the user's ID that your billing system uses into a custom field in SmarterTrack for easy reporting
- Show and hide custom fields based on the department a user has chosen
- Redirect any tickets that have certain custom field values or keywords to an escalation department.

Live Chat Links

This page shows all the Live Chat Links which you have made available on your Web site, and also gives you the ability to add new Links and/or edit/delete existing Links.

To get started, click the Settings button from the main toolbar, then select the Live Chat Links from the External Integration folder in the left tree view.

To add a new link, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you click the Save icon from the actions toolbar.

To edit a link, click the Edit icon from the Actions toolbar or double-click a specific link.

To delete a link, click the Delete icon from the Actions toolbar.

Options

Title - Enter the title you want this link to display

Refresh Rate - Enter the number of seconds you would like live chat to refresh.

Note: SmarterTrack comes installed with the following three default departments. If you have added new departments, they will show up here as well. For information about adding a new department, go to the departments help file.

Enable for Billing Department - Enable this for chat to be available for the billing department.

Enable for Sales Department - Enable this for chat to be available for the sales department.

Enable for Support Department - Enable this for chat to be available for the support department.

Chat Online

Image Link - This is the image that will show up when chat is online.

Description - Enter text that you want displayed when you hover over the image.

CSS Class - This is a style sheet class name that can be applied to the image if you want to skin the image in your Web site.

Chat Offline

Image Link - This is the image that will show up when chat is offline.

Navigate URL - Enter a URL that you want customers taken to when the image is clicked on while chat is offline

Navigate Target -

Description - Enter text that you want displayed when you hover over the image.

CSS Class - This is a style sheet class name that can be applied to the image if you want to skin the image in your Web site.

Social Networking

This page gives you the ability to add social networking links on the portal to share different items throughout SmarterTrack.

To get started, click the Settings button from the main toolbar, then select Social Networking from the External Integration folder in the left tree view.

Check any of the boxes to have them added to the portal. No changes will be saved until you have clicked the Save icon from the actions toolbar.

Custom Fields

Field Definitions

This page shows all the custom fields that have been created, and also gives you the ability to add new fields and/or edit/delete existing fields.

To get started, click the Settings button from the main toolbar, then select Field Definitions from the Custom Fields folder in the left tree view.

To add a new field, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a field, click the Edit icon from the Actions toolbar or double-click a specific field.

To delete a field, click the Delete icon from the Actions toolbar.

Display Name - Enter the name you want displayed and associated with this new field.

Data Type - Select the type of field from the drop down list you want this to represent. Depending on your choice here, other fields may need to be completed.

Default Value - Enter the default value you would like to use for this field.

Search Definitions

Search definitions allow you to query your own external database to find information about accounts, products, etc.

This page will show all available search definitions to query, and also gives you the ability to add new search definitions and/or edit/delete existing search definitions.

To get started, click the Settings button from the main toolbar, then select Search Definitions from the Custom Fields folder in the left tree view.

To add a new search definition, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a search definition, click the Edit icon from the Actions toolbar or double-click a specific definition.

To delete a search definition, click the Delete icon from the Actions toolbar.

Note: Contents of this page is assumed to be known information to system administrators. Consult your administrator for more information on query strings.

Query

Display Name - Enter the name you would like associated with query.

Query Type - Choose the query type you would like to use from the drop down list.

Enter the variables and query strings into the Connection String and SQL Query fields.

Inputs

This tab gives you the ability to name the different variables that will be inputted by a customer.

Outputs

This tab gives you the ability to designate which variables will be displayed due to the SQL Query search.

Example

Query Text: select Name from Products where modelNumber= @mn

Inputs: @mn -"Model Number"

Outputs:Name

Templates

This page shows all the available templates that can be used within a department, and also gives you the ability to add new templates and/or edit/delete existing templates.

To get started, click the Settings button from the main toolbar, then select Templates from the Custom Fields folder in the left tree view.

To add a new template, click the New icon from the actions toolbar, then complete the following information. No new information will be saved until you have clicked the Save icon from the actions toolbar.

To edit a template, click the Edit icon from the Actions toolbar or double-click a specific template.

To delete a template, click the Delete icon from the Actions toolbar.

Options

Display Name - Enter the name you would like to have displayed on the first page.

Field Definitions

The field definitions tab is where you will define what custom fields you want displayed throughout SmarterTrack. You will use the drop down boxes to determine what order you want your fields to be placed. Then enter any display name you want for that particular field. Finally, you have the option to check if you want that field visible in this particular template and if you want it to be required information before your customer can move on to the next step.

Search Definitions

Choose any searches that you want to appear with this template. For example, you may have a search that looks in your database for products.

Reports

Reports Overview

Summary Reports display summarized data within a defined block of time. Summary Reports are especially useful for determining the overall usage and performance of Department, Groups, and Users relative to each other.

Trend Reports display data points—connected by trend lines—for a selected time span. These trend reports are especially useful for determining the usages and performance month-by month, day-by-day, and hour-by-hour (etc.).

Note: Not all reports are available for all permission levels.

Reports Options

You will see a calendar of the current month and fields with drop down menus on the right side. Use the following parameters to construct your report.

NOTE: Not all of the options below will be available for each report type.

Calendar - You can choose any amount of time you wish to base your report on□day,week, or month.

Rows - You can choose how many rows you would prefer to have shown□10,100, 500, 1000, 10,000 '

Sort - You can choose which column you would like the data sorted by. Then you can select if you want it sorted in Ascending or Descending order.

Chart - This allows you to select which type of graph you want your data displayed in.

Value 1 - This gives you the option of which values you want to use in your graph.

Value 2 - You can choose if you would like to add a second value to your graph.

Group by - You can choose how you want the data displayed□Department,Group, or User.

Filter by - You can choose how you would like the data filtered.

Refresh - You can choose how often you would like the data recalculated.

Once you have the data which you want shown in the report, click the Get Report button on the right side.

Across the action toolbar there are four icons— Add Favorite , Email , Export , and Print .

Add Favorite - This will allow you to add this report to your favorites list.

Email - This will allow you to send another person your report.

Export - This will allow you to export your report to a file.

Print - This will allow you to print your graph and chart.

Summary Reports

Audit Reports

Audit Reports - Agent-Group Activity

This report shows all status changes at the department, group, or user level, and also showing changes to the active groups for chat or ticket receipt. This is useful for seeing specifics about the activity of your agents.

Audit Reports - Agent Web Sessions

This audit report lists all the web sessions for an agent (or all agents) for the time period chosen. This is useful for monitoring the activity of your staff. Sessions within 3 minutes of one another are joined and considered the same session for reporting purposes.

Audit Reports - Coverage Time

This report shows the number of hours and minutes that are covered by at least one active support agent for each group or department during the time period chosen. Chat and Ticket coverage are reported separately because agents can become active in those areas separately.

Audit Reports - Deletions

This report shows the number of tickets and chats marked as deleted in the system. Note that once a deleted item is purged from the database, its history is also removed and it will not show in this report.

Audit Reports - Transfers

This report gives an overview of the transfer activity of tickets and chats.

Canned Replies

Canned Reply Contributions

This report shows a summary of the contribution individual agents have made towards the contents of the Canned Reply system, and also shows how much or how little the agent uses canned replies in ticket responses.

Canned Reply Popularity

This report shows the most popular canned replies during a time period, by the number of times they were used, and the number of agents that used each one. This is useful for detecting which canned replies are useful, and which need to be phased out.

Canned Replies Created

This report gives you an audit trail of all canned replies created in the system during a period of time, along with the agent that added it.

Canned Replies Modified

This report gives you an audit trail of all edits to canned replies in the system during a period of time, along with the agent that did the editing.

Canned Reply Events

This report shows the full audit trail of all administrative actions in the canned reply system during a period of time. Some of the events shown include modifying, deleting, and reviewing canned replies.

Flagged Canned Replies

This report shows the canned replies in the system that are currently flagged for review. This report is not date specific, and always shows the replies that are currently flagged only. As a result, you will not have access to the date controls for this report.

Stale Canned Replies

This report shows the canned replies in the system that are currently stale and should be reviewed. This report is not date specific, and always shows the canned replies that are currently stale only. As a result, you will not have access to the date controls for this report.

Chat Reports

Chat Overview

This report shows a quick snapshot of chatting overall in the system. The intent of this report is to give you an at-a-glance view of your organization to find other areas to investigate with the more detailed reports.

Chat Messaging

This report shows the incoming messaging properties of chat sessions. Using this report, you can identify the average load of chat sessions, and identify areas to increase or decrease message targets.

Chat Response Times

This report shows the speed in which end users are being responded to by agents for incoming chats. Use this report to identify problem areas where agents may be going too long between responses.

Chat Abandonment

This report shows the the abandonment rate of Live Chats users. Use this information to locate where more agents maybe required or chats need adjusted to overcome the demand.

Outgoing Live Chat Messaging

This report shows the outgoing messaging properties of chat sessions. Using this report, you can identify the average load of chat sessions, and identify areas to increase or decrease message targets.

Outgoing Live Chat Response Times

This report shows the speed in which end users are being responded to by agents for outgoing chats. Use this report to identify problem areas where agents may be going too long between responses.

Outgoing Live Chat Performance

This report shows the performance of Live Chats for a department, group, or agent.

Cost Reports

Cost Summary

This report allows you to see the most expensive areas of your company at a glance.

Ticket Cost Breakdown

This report allows you a more detailed view of costs for tickets, in order to identify problem areas or help predict budgets.

Chat Cost Breakdown

This report allows you a more detailed view of costs for chats, in order to identify problem areas or help predict budgets.

Knowledge Base

KB Contribution

This report shows a summary of the contribution individual agents have made towards the contents of the Knowledge Base.

KB Popularity

This report shows the most popular KB articles during a time period, by Hits and Unique Visitors. This is useful for detecting which KB articles are useful, and which need to be phased out.

KB Searches

This report shows what visitors to your site are searching for in the knowledge base, as well as the performance of those search strings.

KB Searches without Results

This report mimics the KB Searches report, showing what visitors to your site are trying to search for in the knowledge base, but only shows the searches that resulted in no result set. This can be helpful for you in determining what KB articles should be added, or what additional terms should be added to existing articles.

KB Searches without Views

This report will show what visitors to your site are searching for in the knowledge base, but resulted in no views. This can be helpful because you will see that there are a certain amount of articles found per search, but when no articles are being viewed it will let you know that the information is not relevant for what visitors are search for.

KB Articles Created

This report gives you an audit trail of all articles created in the knowledge base during a period of time, along with the agent that added the article.

KB Articles Modified

This report gives you an audit trail of all edits to articles in the knowledge base during a period of time, along with the agent that did the editing.

KB Article Events

This report shows the full audit trail of all administrative actions in the knowledge base during a period of time. Some of the events shown include modifying, deleting, and reviewing articles.

Flagged KB Articles

This report shows the articles in the knowledge base that are currently flagged for review. This report is not date specific, and always shows the articles currently flagged only. As a result, you will not have access to the date controls for this report. This report mirrors the Flagged for Review Articles view in the Knowledge section of the application.

Stale KB Articles

This report shows the articles in the knowledge base that are currently stale and should be reviewed. This report is not date specific, and always shows the articles currently stale only. As a result, you will not have access to the date controls for this report.This report mirrors the Stale Articles view in the Knowledge section of the application.

News

News Contribution

This report shows a summary of the contribution individual agents have made towards News Items.

News Popularity

This report shows the most popular News Items during a time period, by Hits and Unique Visitors. This is useful for detecting which News Items are popular.

News Items Created

This report gives you an audit trail of all items created in the news system during a period of time, along with the agent that added the item.

Modified News

This report gives you an audit trail of all edits to items in the news system during a period of time, along with the agent that did the editing.

News Events

This report shows the full audit trail of all administrative actions in the news system during a period of time. Some of the events shown include modifying, deleting, and reviewing items.

Flagged News Items

This report shows the items in the news system that are currently flagged for review. This report is not date specific, and always shows the items currently flagged. As a result, you will not have access to the date controls for this report.

Note: This report mirrors the Flagged for Review News Items view in the Knowledge section of the application.

Tickets

Tickets Overview

This report shows you the source of tickets for your departments, which can help to analyze their load compared to other departments.

New Ticket Sources

This report shows you the source of new tickets for your departments, broken out between the different methods of creating tickets.

Re-opened Tickets Sources

This report shows you the source of re-opened tickets.

Ticket Statuses

This report shows a snapshot of the workload of your tickets, allowing you to rebalance teams and change ticket weights effectively.

Ticket Response Times

This report is a good view of the responsiveness of your staff by the end user. Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.

Ticket Handling

While the Ticket Response Times report focuses on the external perception of your staff's ability to respond to tickets, the Ticket Handling report instead focuses on the internal workload generated by tickets, and the time required to actually resolve the issue.

Ticket Workload

The Ticket Workload report gives a general overview of the actions performed by your staff at a high level. Use this report to quickly see how each team or agent is performing relative to others, and identify potential staffing changes.

Trend Reports

Canned Replies

Canned Replies Contribution Trend

This report shows the trend of administrative events on canned replies.

Canned Reply Popularity Trend

This report is a view of the activity in your canned reply system, showing the number of agents using canned replies, the number of distinct canned replies used, and the number of times canned replies are used during each time frame.

Chat Reports

Chat Overview Trend

This report shows a quick snapshot of how chatting is changing in the system. The intent of this report is to give you an at-a-glance view of your company to find other areas to investigate with the more detailed reports.

Chat Messaging Trend

This report shows how the number of messages required to complete a chat. Using this report, you can identify if chat sessions are getting more or less chatty over time.

Chat Response Time Trend

This report shows how the speed in which end users are being responded to by agents is changing. Use this report to identify problem areas where agents may be going too long between messages.

Chat Abandonment Trend

This report shows the relationship between wait time in each queue and the abandonment rate of users over time. Use this information to forecast when more agents may be required or max chats need adjusted to overcome the demand.

Cost Reports

Cost Trend

This report allows you to see how estimated costs are changing over time.

Ticket Cost Trend

This report allows you a more detailed view of costs for tickets, in order to identify problem areas or help predict budgets.

Chat Cost Trend

This report allows you a more detailed view of costs for chats, in order to identify problem areas or help predict budgets.

Knowledge Base

KB Contribution Trend

This report shows the trend of administrative events on the Knowledge Base.

KB Popularity Trend

This report is a macro view of the activity in your knowledge base, showing the number of visits and hits during each time frame.

KB Searches Trend

This report shows how searches against the knowledge base have been changing over time. This is useful to know if your knowledge base is becoming more or less effective over time.

News

News Contribution Trend

This report shows the trend of administrative events on the news system.

News Popularity Trend

This report is a view of the activity in your news system, showing the number of visitors that viewed news, and the number of hits.

Tickets

Ticket Overview Trend

This report shows you how the source of tickets has been changing over time.

New Ticket Source Trend

This report shows you the change in sources of new tickets.

Re-Opened Ticket Source Trend

This report shows you the how the source of re-opened tickets has been changing.

Ticket Status Trend

This report shows the change in workload of your tickets, allowing you to rebalance teams, predict trends, and change ticket weights effectively.

Ticket Reponse Time Trend

This report is a good view of the change in responsiveness of your staff by the end user. Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.

Ticket Handling Trend

This report shows the change in internal workload generated by tickets, and the time required to actually resolve the issue.

Ticket Workload Trend

The Ticket Workload report gives a general overview of the actions performed by your staff at a high level. Use this report to quickly see how each team or agent is performing relative to others, and identify potential staffing changes.

Events

Events Overview

The Events system allows you to act on Events that occur throughout the system when certain things happen, such as a new ticket coming in or a KB article being modified. SmarterTracks's Event System is intended to allow an infinite number of unique customizations using notification profiles and the reminders system.

There are two types of events in SmarterTrack. User level events (under My Events) and System Level Events (under System Events). User level events are specific to you, and allow you to receive notifications when events occur. System level events are available only for system administrators, but have far more actions available, such as transferring tickets, emailing custom messages, etc.

Manage Events

The All Events page lists all of your scheduled events and lets you perform many actions, including: editing, deleting, searching, or adding a new event.

View your Events by clicking the Setting button from the main tool bar, then selecting the Events control bar at the bottom left hand corner, and finally clicking All Events under My Events from the tree view in the sidebar.

Adding an Event - To add a new event, either select New Event from the tree view, or click the New icon from the actions toolbar.

Edit an Event - Editing an event can be done in three different ways:

- Select the event that you would like to edit and then click the Edit icon from the actions toolbar, or
- Double-click the event that you would like to edit.

Deleting an Event - Deleting an event can be by:

- Select the event that you would like to delete and then click the Delete icon from the actions toolbar

Searching an Event - To search your events, first click the Search icon from the actions tool bar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, Event Category, Event Type, Conditions, or Actions.

Create a New Event

To add a new user event for yourself, select New Event from the left tree view. To create a system level event, go to the All Events area under System Events and click on New .

The event page is split into two tabs—Options and Actions.

Options Tab

Name - Allows you to assign a specific name to your event.

Event Group - Allows you to select a folder in which to store/associate your event subscriptions.

- To add a new Event Group, click the Plus Sign icon on the folders toolbar.
- To edit an Event Group, select the Event Group you wish to Edit and then click the Pencil icon on the folders toolbar.

Event Category - Select the trigger category for your notification. For more information about specific event categories, select a category for the Event Categories folder.

Event Type - This is a specific trigger relating to the Event Category.

Based upon the Event Category and Event Type that was chosen, different attributes will be available for you to choose to help set up your event. For information on the various attributes available, see the help pages for Events Categories.

Actions Tab

When clicking the Actions tab the screen will be blank. To add a new event, click the Add Action icon from the actions toolbar.

Action - This defines how the system will alert you.

Max Frequency - This allows you to set how often you want to be notified.

Notification Profile - This allows you to choose which profile you want to use.

From Address - This is the email address from which the email will be sent from.

Subject, Short Body, and Body will all be populated by the system using the variables from the bottom.

Once all fields are complete, click the Save icon from the actions toolbar to save that event.

KB

KB Article Created

This event is triggered when a new KB Article is created in the system.

KB Article Deleted

This event is triggered when an article is deleted by an agent. This will notify a manager to review the article to decide if it should be purged or undeleted.

KB Article Flagged for Review

This event is triggered when an article has been "Flagged for Review" by an agent.

KB Article Modified

This event is triggered when any content within a KB Article is changed (body or subject).

KB Article Reviewed

This event is triggered when an article has been "Marked as Reviewed" by an agent.

KB Article Stale

Administrators and managers have the ability to determine the number of days an article becomes stale if it has not been accessed. The system scans for stale articles every fifteen minutes for articles that have not had notifications sent. This event will be triggered when a stale article is detected. This will notify an agent or manager that the article should be reviewed.

Tickets

Ticket Comment Added

This event is triggered when a ticket comment is added by an agent.

Ticket Count for Agent

This event is triggered every minute and calculates the ticket count for a specific agent.

Ticket Count For Group

This event is triggered every minute and calculates the ticket count for a group.

Ticket Count For Department

This event is triggered every minute and calculates the ticket count for a department.

Ticket Created

This event is triggered when a ticket is created and assigned. This can notify a manager when an important customer submits a ticket.

Ticket Deleted

This event is triggered when a ticket is deleted or marked as spam.

Ticket Idle

This event is triggered every five minutes that a ticket is active. This can automatically transfer and prioritize a ticket if it's idle too long.

Ticket Message Received

This event is triggered when a ticket is received from a customer. This can alert a user that they have a new ticket in their box.

Ticket Message Sent

This event is triggered when a ticket is sent from an agent to a customer. This can notify a manager if certain keywords are sent to the customer.

Ticket Priority Changed

This event is triggered when the priority of a ticket is changed.

Ticket Status Changed

This event is triggered when the status of a ticket is changed.

Ticket Transferred

This event is triggered when a ticket is transferred to a group, department, or agent. This can notify the escalation department or an agent that they have received a new ticket.

WhosOn

Chat Accepted

This event is triggered when a visitor of the Website accepts a chat invitation from an agent.

Chat Forced

This event is triggered when an agent forces a chat through the WhosOn management page to a user visiting the Website.

Chat Invitation Ignored

This event is triggered when a user doesn't acknowledge a chat invitation before it times out or if they navigate to a different page with an active chat invitation on the last page.

Chat Invited

This event is triggered when an agent sends a chat invitation to a user visiting the Website.

Chat Rejected

This event is triggered when a user rejects an a chat invitation from an agent.

Online Activity

This event is triggered in a background thread every 10 seconds to check online users. Users that meet the event criteria will cause an action for each user.

Online Visitor Purged

This event is triggered when a user has been purged from the WhosOn grid view in the "Removed Users" filter.

Online Visitor Removed

This event is triggered when a user has been removed from the WhosOn grid view.

Glossary

Below is an alphabetized list of the various terms and phrases used in the SmarterTrack Product.

End User License Agreement (EULA)

SMARTERTRACK END USER LICENSE AGREEMENT SmarterTools, Inc. Software License Terms

This End User License Agreement ("EULA") is between SmarterTools, Inc. ("SmarterTools") and the end user ("You") of the software product this EULA accompanies ("Software"). It is important to read and understand all of the terms, limitations, and conditions contained in this EULA prior to installing and using the Software because they affect how You may use the Software. By explicitly accepting this EULA, or by installing, copying, downloading, accessing, or otherwise using the Software, You agree to be bound by the terms of this EULA. If, prior to using or installing the Software, You decide that You are unable or unwilling to agree to the terms of this EULA, promptly and completely uninstall and destroy any electronic copies of the Software and accompanying items in your possession.

This EULA applies to:

* This Software, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable certain Features Selection(s) in the Software (collectively, "License Keys")

* Future Versions of this Software

* Updates and plugins to this Software, as may be made available by SmarterTools from time to time, including but not limited to language packs, dictionaries, and skins (collectively "Updates")

* Features selection(s), including "Professional," "Enterprise", and "Free" editions of the Software, and maximum allowed numbers of users, profiles, devices, email addresses domains, web sites, or agents ("level"); (collectively, "Features Selection")

* Services, support, advice, and recommendations related to this Software that may be made available by SmarterTools on the Internet, in the Software documentation, or by telephone

* Any and all Technical Support Services offered in connection with the Software

Definitions:

The following definitions shall apply for the purposes of this EULA

* "Shared Hosting" shall refer to an individual, group, or organization ("Shared Host") that maintains a physical server device upon which software and/or tools are owned and installed by the Shared Host and made available to third parties for access or use; whether or not a fee or other compensation is

exchanged; and in which the third parties do not have authorization or access to the activation areas of the Software and/or do not have authorization or access to system administration functions.

* "Dedicated Hosting" shall refer to an individual, group, or organization ("Dedicated Host") that maintains a physical server device that is wholly or, in the case of Virtual Private Servers ("VPS"), a dedicated portion of a physical server device that is sold, leased, or otherwise made available to a third party; whether or not a fee or other compensation is exchanged; and in which the third party has authorization and/or access to the activation areas of the software and/or to system administration functions.

1. License.

A. Grant of License.

Subject to the terms and conditions of this EULA, SmarterTools hereby grants You a revocable, non-exclusive, non-transferable license to use the Software ("License") in accordance with the terms and conditions of this EULA. This License shall commence on the effective date of this EULA and shall remain in effect until terminated in accordance with the terms of this EULA or superseded by another end user license agreement pursuant to installation of an Update or changes in Features Selection. SmarterTools, together with any third party content providers whose software code is incorporated in the Software or distributed with it, retains all right, title, and interest to the Software, including, but not limited to, copyrights, trademarks, proprietary methods, and trade secrets incorporated into the Software.

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This License to use the Software is conditioned upon You paying all related charges and fees imposed by SmarterTools for purchase or monthly-license of the Software. SmarterTools may, in its sole discretion, terminate this License if You fail to pay such charges or fees within the time allowed by SmarterTools.

B. Use of the Software.

You shall use the Software for Your own personal or internal business purposes. Personal or internal business purposes shall include the installation of the Software and activation of only one License key on a single personal computer or server, one instance of a Virtual Private Server, or as one instance within Your portion of a Shared Hosting environment, for Your own use or use by Your Customer(s) pursuant to the terms of section 1.C. below.

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D. Limitations on Use of the Software and License Keys You shall not modify, reverse engineer, reverse assemble, decompile, disassemble, decrypt, reflect, or use reflection on the Software, or otherwise attempt to discover or obtain the source code or structure, sequence, or organization of the software in whole or in part, except as provided in Section 9 of this EULA. You may distribute copies of the software code in the same format that you received it, pursuant to the terms of this EULA, so long as You do not modify the Software in any way and so long as all copyright, trademark, and other notices contained in the Software remain intact.

The Software may periodically and automatically contact SmarterTools pursuant to Section 10 of this EULA. This contact may occur without any notice to You of such contact, and You hereby consent to such contact with SmarterTools. You shall not disable, delay, dismantle, disrupt, or otherwise interfere with the ability of the Software to contact or communicate with SmarterTools or the authentication of License Keys. Further, You shall not attempt to bypass, circumvent, disable, design around, or obviate the License Keys for any reason, including but not limited to attempts to access features or capabilities in the Software not included in your Features Selection. Further, other than pursuant to Section 1.C. of this EULA, You shall not disclose or disseminate any License Keys associated or distributed with the Software, publicly or to any third party, nor shall You allow anyone else to use any such License Keys.

You may reassign this Software to a different device owned, leased, or rented by You subject to SmarterTools' approval in its sole discretion, provided that You completely uninstall or delete the Software from any personal computer, server, Virtual Private Server, or other device on which the Software was previously installed. SmarterTools reserves the right to require, in its sole discretion, reauthorization, re-registration, or another form of authentication at no additional charge to enable reassignment of the Software, and may disable access to the Software if it determines, in its sole discretion, that such reassignment is prohibited by the terms of this EULA or constitutes fraud.

You shall not use the Software to harm third parties, disseminate unsolicited communications (emails, etc.), requests, or harmful data or programs including but not limited to malicious scripts and viruses. You shall not use the Software to disseminate pornography, child pornography, or other harmful or illegal materials, or in any way that may disparage or bring disrepute to SmarterTools.

2. Term and Termination.

This EULA is effective as of the date You install or use the Software, or as of the date You accept this EULA, whichever is sooner. You may terminate this EULA by completely deleting and wholly destroying any copies of the Software and documentation in Your possession or control. SmarterTools may terminate the License or EULA if, in its sole discretion, SmarterTools determines that You have breached any of the terms and conditions of this EULA, with or without notice to You of such termination.

Sections 1.B., 1.C., 1.D., 3, 5, 6, 7, 8, 9, 10, 11, and 12 shall survive termination of this EULA.

3. Limited Warranty and Limitation of Liability.

A. No Warranties

SmarterTools does not warrant that the Software will meet Your requirements, that the operation of the Software will be uninterrupted or error-free; that any data supplied by the Software will be accurate; or that the Software will work with any 3rd-party or supplemental software or hardware furnished with or accompanying the Software. Further, SmarterTools does not warrant the efficacy, functionality, or operation of such Accompanying Software or Hardware. ALL HARDWARE, SOFTWARE, OR OTHER PRODUCTS OR SERVICES PROVIDED BY SMARTERTOOLS UNDER THIS EULA ARE PROVIDE AS-IS, AND SMARTERTOOLS EXPRESSLY DISCLAIMS ALL WARRANTIES, INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

B. No Liability for Damages

SmarterTools shall not be liable for any damages under this EULA, including but not limited to consequential, statutory, punitive, incidental, or indirect damages, including but not limited to any loss of data, loss of profits, loss of savings, loss of time or convenience, or additional cost arising out of the use of or inability to use the Software, documentation, or any 3rd-party or accompanying software or hardware; even if SmarterTools has been advised of the possibility of such damages. Further, SmarterTools shall not be liable for nor bound by any claims, representations, promises, assertions, or other statements made by anyone other than SmarterTools employees or officers, including but not limited to resellers and sales representatives. SmarterTools shall not be liable for any damages or inconvenience resulting from errant data or misreporting of data, nor failures to relay information that may be deemed important by the user, or for any damages arising from events listed in section 5 of this EULA.

C. Limitation of Liability

Your sole remedy under this Agreement shall be limited to replacement of the Software.

4. Technical Support

Currently, SmarterTools provides technical support for the Software via SmarterTools personnel, documentation, and Internet resources. Depending on Your Features Selection, including but not limited to pricing, volume, Software version, and the number of licenses You purchased, a certain amount of technical support may be included at no additional charge. Otherwise, technical support may be available for an additional charge on a per incident, per call, per time-frame basis, or in other support packages. The amount of these charges may vary from time to time. Technical support is provided AS-IS, and the provisions of section 3.B. and 3.C. apply to technical support.

SmarterTools provides no guarantee, expressed or implied, regarding the efficacy or continuation of technical or other support for this Software or particular version of this Software for any length of time and SmarterTools may choose to discontinue such support at any time and for any reason.

5. Indemnification.

You shall defend, indemnify, and hold harmless SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns (hereafter "SmarterTools Indemnified Parties") from any claims, damages, losses, or expenses (including without limitation attorney fees and costs) incurred in connection with any and all damages, losses, claims, suits, judgments, or causes of action asserted against SmarterTools Indemnified Parties by third parties or Your Customers related to:

* Any claims arising from or related to Your use of the Software or use of the Software by Your Customers or any portion thereof, including but not limited to claims of infringement of patents, copyrights, or other intellectual property or proprietary rights arising from your use of the Software or

from use of the Software or any portion thereof in combination with any other software, hardware, device, system, or service;

* Damages arising from Your breach or Your Customer's breach of this EULA;

* Any loss, misdirection, or inaccuracy of any and all data, message, and/or information (partial or complete) by or directed to You, Your Affiliates, Your Customers, Your vendors, Your assignees, or any related third party and from any action, inaction, or consequence arising out of such loss, misdirection, or inaccuracy of any data, message, or information;

* Any misuse, abuse, hostile transmission, fraud, or unlawful action arising from or related to the use of the Software or any portion thereof by or directed at You, Your affiliates, Your Customers, Your vendors, Your assignees, and/or any related third party;

* Any claim, damage, loss, or expense related to the installation, quality, use, operation, functionality, transfer, or deinstallation of the Software to You, Your Customer(s), or third parties.

* Any charges imposed by You or third parties on You or Your Customers related to Your or Your Customer(s)'s use of the Software, including but not limited to charges for data transmission and bandwidth, regardless of whether you have followed any configuration recommendations provided with the Software or Software documentation.

6. Transfers

The rights under the License may be sublicensed under the terms of Section 1.C. or transferred to any of Your successors, heirs, or assigns upon prior written notice to SmarterTools. Any other attempt to sublicense, assign, or transfer any of the rights, duties, or obligations hereunder is void unless You have a separate written agreement with SmarterTools allowing for such transfer(s).

7. Jurisdiction.

This Agreement shall be governed in all respects by the laws of the United States and the State of Arizona, except for conflict of laws provisions. The parties agree that for any dispute, controversy or claim arising out of or in connection with this Agreement, venue and personal jurisdiction shall be in the federal, state or local court with competent jurisdiction located in Maricopa County, Arizona. The prevailing party will be entitled to an award of reasonable attorney's fees.

In the case that You are an agency or entity of the United States Government, the following additional terms apply:

* The Software qualifies as Restricted Computer Software, as defined in the Rights in Data-General clause at Federal Acquisition Regulations 52.227-14.

* Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013.

8. Payments.

You shall pay the total fee(s) for the Software imposed by SmarterTools at the time of purchase. You shall pay all invoices rendered by SmarterTools within thirty (30) calendar days after the invoice date, or within another time frame set forth by SmarterTools in writing in a separate agreement. All payments shall be made in United States Dollars ($). If You fail to pay any amount due within the above timeframe, SmarterTools may impose late charges equal to the lesser of 1.5% per month or the highest interest rate allowable by applicable law, together with all related expenses and collection costs, including reasonable attorneys' fees, incurred by SmarterTools collecting any amounts owed under this EULA. Further, You shall reimburse SmarterTools for any out-of-pocket expenses incurred in connection with duties performed by SmarterTools hereunder. Upon request by You, SmarterTools shall provide You with reasonable documentation evidencing the out-of-pocket expenses incurred by SmarterTools.

SmarterTools may disable License Keys for invoices that are not paid within a reasonable timeframe as determined by SmarterTools in its sole discretion. Licenses purchases that are made fraudulently, deceptively, or that result in a charge-back or disputed charge are considered to be not paid and are subject to disable.

9. Limitations to Customization.

Should You choose to alter the appearance and/or user interface of the Software (the "Skin") by using the custom style or Skin options included in certain versions of the Software or by using a third-party process to alter the appearance or interface of the Software, the following requirements must be met:

* You shall maintain and not remove or obscure any proprietary notices in the Software. The SmarterTools name may be displayed in any font type or style, but it must be displayed in no smaller than 8-point font. The name of the Software shall remain visible to the naked eye and free from any clutter or similar color scheme (e.g. black font on a black or similarly dark background that would preclude the user from easily identifying the Software). Use of the qualifiers "powered by" and "provided by" is permitted (e.g. "Powered by SmarterMail"). Any deviation from these limitations must be approved in writing by SmarterTools in advance of implementation and may result in additional license fees, if applicable.

* All applicable copyright and trademark information shall remain visible to the naked eye, free from

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11. Severability.

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein.

12. Entire Agreement.

This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and understanding relative thereto, if any, being herein merged. This Agreement replaces and supersedes any prior agreement entered into between the parties hereto with respect to the subject matter herein.

Thank You for choosing SmarterTools Software.

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