



Portal

Help Documentation

Portal

Portal Settings

To access the portal settings, click the settings icon . Then expand the System Settings and Portal folders and click Portal Settings in the navigation pane. The portal settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Display user login form - Checking this box will allow users to login from the portal. By default, this setting is enabled. Note: If this setting is disabled, agents and administrators can only log in through the /login.aspx site.
- Display live chat link - Checking this box will display a link to initiate a live chat on the portal. By default, this setting is enabled.
- Display management interface link - Checking this box will display a link to login to the management interface on the portal homepage. By default, this setting is enabled.
- Enable new user registration - Checking this box will allow visitors to register for an account from the portal. By default, this setting is enabled.
- Require visitors to pass CAPTCHA when registering - Checking this box will require portal visitors to complete a CAPTCHA during the account registration process. By default, this setting is enabled to prevent spam bots from gaining access to the portal.
- Enable users to change email address - Checking this box will allow users to change their email address on file. By default, this setting is enabled.
- Enable users to change passwords - Checking this box will allow users to change their login password. By default, this setting is enabled.
- Enable users to change display name - Checking this box will allow users to change their display name. By default, this setting is enabled.

Use this tab to specify which file types can be uploaded to Tickets and Live Chats:

- Allowed Extensions - The file types that a user can send to an agent via a Ticket or Live Chat. By default, allowed file types are .doc,.docx,.txt,.xls,.xlsx,.pdf,.zip,.rar,.xml,.jpg,.jpeg,.gif,.png,.bmp,.tiff,.tif,and .ico. --%>

Knowledge Base

Use this tab to edit the following Knowledge Base settings:

- **Default Page** - The default page that displays when a user visits the Knowledge Base. By default, the search the Knowledge Base setting is enabled.
- **Items Stale After** - The number of days after which news items become stale. By default, news items are stale after 90 days.
- **Popular Articles** - The number of days used to calculate the popularity of KB articles. By default, the portal displays the most popular KB articles for the last 90 days.

Tracking

Use this tab to configure Google Analytics tracking on the portal:

- **Google Analytics Site ID** - The unique identifier used to track your site in Google Analytics
- **Enable tracking of portal visitors using Google Analytics** - Checking this box will automatically place the Google Analytics trac

Custom Links

Use this section to add portal links to other websites and resources. To view a list of custom links, click the settings icon . Then expand the System Settings and Portal folders and click Custom Links in the navigation pane. A list of custom links will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple links. Custom links must be selected before choosing an action from the toolbar.
- **Title** - The link name displayed in the portal.
- **Description** - A brief description of the linked site.
- **Role Required** - The role of users that have access to the link.

The following options are available from the actions toolbar:

- **New** - Creates a custom link.
- **Edit** - Allows the system administrator to make changes to an custom link's settings.
- **Delete** - Permanently deletes the selected link(s).

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

Options

- **Title** - The link name displayed in the portal.
- **Description** - A brief description of the linked site.
- **Display Order** - The order in which the link is displayed.

- Link URL - The URL to the linked website.
- Link Target - To specify how the linked site will open, select the appropriate option from the list.
- Role Required - To specify which users have access to the link, select the appropriate role from the list.
- Icon - The image to be displayed for this link in the portal.
- Enable in portal - Checking this box will display the link on the main portal page.
- Display as a tab - Checking this box will display the link on a separate portal tab. Note: To display the link as a separate portal tab, the "Enable in portal" option must also be enabled. If this option is not enabled, the portal tab will not display.

Brands

Use this tab to specify the brands for which the link will display.

Sitemap

To help boost the ranking of portal pages in search engine results, system administrators can submit the portal's sitemap to search engines.

To access this section, click the settings icon . Then expand the System Settings and Portal folders and click Sitemap in the navigation pane. The sitemap settings will load in the content pane and the following fields will be available:

- Search Engine - To specify which search engine to submit the portal sitemap to, select the appropriate option from the list.
- Brand - The brand to which the sitemap is assigned.
- URL - The URL of the portal sitemap XML file. Note: This URL is automatically generated by SmarterTrack.

Social Networking

A social networking service like LinkedIn , Digg , or Facebook focus on building communities of people who share interests and/or activities. With SmarterTrack's social networking feature, companies can encourage portal visitors to share company information with their social network(s).

To access the social networking settings, click the settings icon . Then expand the System Settings and Portal folders and click Social Networking in the navigation pane. A list of social networking sites will load in the content pane.

Use the checkboxes to add or remove links to social networking sites on the company's portal.