SmarterTrack 6.x

Help Documentation

This document was auto-created from web content and is subject to change at any time.

Copyright (c) 2021 SmarterTools Inc.

SmarterTrack Help

Welcome to the SmarterTrack Help System. In the tree menu on the left you will find various help topics that will help you use SmarterTrack more effectively. At the top of each page, there are links that will allow you to search the help, visit the SmarterTools Community, browse the knowledge base, watch product videos, or either print the page you're on or view the page as a PDF file. At the bottom of each content window, there is also a "Link to this page" text link that can be used for to send people directly to that page of the help file.

If you need assistance beyond what's available in this documentation, feel free to review the paid support options and self-help resources found on the Support Portal .

Getting Started

SmarterTrack is a powerful help desk application built for tracking, managing, and reporting on customer service and communications, including sales and support issues. Use the Getting Started section of the SmarterTrack Online Help as a quick resource to help you set up the application.

- Download the SmarterTrack installation file from the SmarterTools Web site .
- Run the InstallShield Wizard.

- If you are installing SmarterTrack on a dedicated server, please refer to the KB article How To - Install SmarterTrack on a Dedicated Server for step-by-step installation instructions for this environment.
- If you are installing SmarterTrack on a shared server, please refer to the KB article How To - Install SmarterTrack to a Shared Server for step-by-step installation instructions for this environment.
- Customers using Hosted SmarterTrack will have access to the program shortly after activating a free trial or purchasing a paid subscription. Because SmarterTrack is already installed on SmarterTools servers, hosted service customers do not need to worry about installation. However, they will need to follow the instructions provided in their welcome emails to activate and set up their hosted service.
- Set up the SmarterTrack database. For more information, see Setting Up the Database .
- Set up IIS if necessary. For more information, see Running as an IIS site .
- Login to SmarterTrack as the primary administrator (if you are not logged in automatically).
- Run the Database Connection Wizard.
- Run the Company Setup Wizard to begin setting up your company's agents, groups, departments, and brands.

General Information

What is SmarterTrack?

SmarterTrack is a powerful application built for tracking, managing, and reporting on customer service and communications, including sales and support issues. Features include:

- A world-class ticket solution that transforms service, sales, and support emails into a powerful information distribution system.
- Live chat, which gives businesses the ability to reduce phone calls, capture information on website visitors, and assist more customers concurrently.
- Who's On, which gives businesses real-time tracking of customers as they navigate websites, providing the opportunity to increase sales, expedite customer service, and gather information on site visitors.
- A portal interface that is optimized for search engines and functions as the central hub for all communication channels.
- Self-service resources, such as a Knowledge Base and news items, that allow customers to research and resolve questions and issues on their own.
- A Web-based interface that provides accessibility wherever an Internet connection is available.
- An integrated survey system.
- More than 70 summary and trend reports with many levels of customization and filtering
- Support for multiple brands within a company.
- And more...

SmarterTrack is a complete customer service solution for individuals, small businesses, and enterprise organizations and is available as a traditional software installation or as a hosted service. In addition to providing your company with an effective customer support structure, SmarterTrack offers powerful tracking and effective reporting that help to manage company costs and employee scheduling.

How SmarterTrack Works

There are two main components that work together within SmarterTrack: the Web interface and the database backend. Both components must be active for SmarterTrack to operate.

Web Interface

The Web interface is a website that is used for administration and interactivity with SmarterTrack. It is divided into two components: the management interface and the portal interface. System administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets and chats. Customers can also use the portal interface to retrieve ticket information, submit new tickets and chats, or search Knowledge Base articles.

Database Backend

SmarterTrack needs a database to store data. For SmarterTools customers using Hosted SmarterTrack, the database backend is installed on servers managed by SmarterTools. For more information regarding the database backend requirements, see Setting Up the Database .

- Microsoft SQL Server - Version 2005 or higher recommended
- Microsoft SQL Server Express - Version 2005 or higher
- MySQL - Version 5.1 or higher recommended Note: SmarterTrack 5.x will only support the InnoDB database engine and will attempt to use InnoDB for all upgrades and new installations. For information on converting a database to InnoDB, see the KB article How To - Convert from MyISAM to InnoDB . --%>

Browser Requirements

SmarterTrack is fully supported by the browsers below.

Management Interface

- Internet Explorer 6 and higher
- Google Chrome 2 and higher
- FireFox 2 and higher
- Safari 3 and higher
- Opera 10 and higher

Mobile Interface

- iPhone/iPad 3G and higher
- Droid
- Windows Mobile and Windows Phone 7
- BlackBerry (Limited support on older devices)

Using the SmarterTrack Mobile App

SmarterTrack Enterprise Edition includes access to the mobile interface, allowing agents to manage and respond to tickets from their mobile devices as if they were in the office. The SmarterTrack mobile app uses Web services available in SmarterTrack 6.x and works across all major mobile devices, including iPhone, iPad, Android, newer BlackBerry devices, and Windows phones.

To access the mobile interface, browse to http://[yourSmarterTrackUrl]/m on your mobile device.

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 event system allows users to act on events that occur throughout the system when they occur, such as the creation of a new ticket or the modification of a knowledge base 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.

Examples of how SmarterNotify can be used in conjuction with SmarterTrack include:

- An escalation department that only receives a few tickets each day may use SmarterNotify to alert agents or system administrators when a customer has responded to a ticket or a ticket is transferred between agents.
- A supervisor may configure the programs to notify him when there are too many tickets in the queue or when a ticket is waiting too long for a reply.
- And more.

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 . To download SmarterNotify, visit the SmarterTrack Downloads page of the SmarterTools website.

Copyright and Trademark Information

All contents of this help file, as well as all contents in our products and on SmarterTools.com are Copyright © 2002-2021 SmarterTools Inc. All Rights Reserved. The SmarterTrack&#153 and SmarterTools&#153 names and logos are trademarked and protected by SmarterTools Inc.

Product and Component Acknowledgements

-

Interface control provided by•

Charting component produced by

Telerik is a trademark of Telerik Corporation. Nevron and Nevron Chart for .Net are trademarks of Nevron LLC. Other trademarks, product and service names, and logos used and not belonging to SmarterTools are trademarks of their respective owners.

Release Notes

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

Concepts

The SmarterTrack Philosophy

Customers judge the quality of an organization's customer service on the basis of availability, choice, and the speed at which they can get their issue resolved. For this reason, companies can no longer rely on a single channel to deliver products or services to their customers. With SmarterTrack, companies can reach out to their customers through many different communications channels and even guide their customers to the most cost-effective and efficient method.

To maximize the efficiency of multichannel interactions, companies need to help customers determine the best channels to use by guiding them through the sales and support process. In doing so, companies can shape when and how they interact with the people who buy their products and services--ultimately balancing the preferences of their customers with the economics of their channels.

The Customer Service Channels

In general, contemporary customer service channels should operate as a funnel, with customers utilizing the least costly channels first. Ideally, companies should aim to encourage customers to use channels in this order:

- Self-service (Knowledge Base articles, help files, white papers, news items, website information, etc.)
- Social service (Community forums, social networking sites, blogs, etc.)
- Live chat
- Ticket system
- Phone

Given that automated, self-service, and Web-based communications are inherently more efficient than those that require immediate agent attention, it makes sense to encourage as many communications as possible through these channels, thereby reserving agent resources to deal with highly complex issues.

Of course, some customers are going to work their way through all these customer service channels before resolving their issue--and that's OK as long as the company can successfully document the steps taken to resolve the issue and use this information to improve customer interactions at the top of the funnel. This will ensure that future interactions have the oportunity to be resolved earlierin the process next time.

For example, if an issue has escalated through the channels to a phone support incident before it is resolved, the company can now capture the data, search critieria, and steps taken to resolve the issue, and push that information to its employees. This creates an opportunity to update the aresenal of resources to more efficiently and cost-effectively serve its customers. Two weeks later, when another customer with the same issue enters a similar search query in the Knowledge Base or types certain key words into the live chat window, the information will be available immediately and can be displayed to the customer or agent in real time. As a result, the customer will find a solution two steps earlier than the previous customer did--instantly bringing efficiency to the customer service team and increasing customer satisfaction.

Over time, the constant feedback of tickets, Knowledge Base articles, and searches into the communications funnel dynamically increases the number of resolutions occurring closer to the top. The increasing efficiency can result in tens of thousands of dollars in saved costs and increases in customer satisfaction as they receive detailed answers earlier in the customer service cycle.

Inefficient Service Channel Flow

Request	Dollars*
500	$125
1000	$500
2000	$4,000
2500	$23,750
4000	$108,000
Total Cost:	$136,375

* Based upon $0.25 per self service, $0.50 per social service, $2.00 per live chat, $9.50 per ticket/email, and $27.00 per phone request.

<u>Efficient Service Channel Flow</u>

Request	Dollars*
4000	$1,000
2500	$1,250
2000	$4,000
1000	$9,500
500	$13,500
Total Cost:	$29,250

* Based upon $0.25 per self service, $0.50 per social service, $2.00 per live chat, $9.50 per ticket/email, and $27.00 per phone request.

Managing Channels From One Application

While some companies may deploy multiple customer service channels through a variety of solutions, SmarterTrack allows companies to operate and manage these channels from a single application. In addition to making channel management more efficient, this provides companies with increased access to business intelligence and allows managers to identify relationships between various customer service channels.

For example, SmarterTrack can report on live chats, tickets, and WhosOn results to determine how customers are finding information on a website and compare their ability to use that information. Similarly, a company can utilize custom fields to capture customer-specific information (such as physical location, product serial number, server locattion, etc.). Reports can then be configured to identify specific areas of concern (locate errant networks, identify faults to the manufacturing location or supplier, identify agents struggling with certain topics/issues, etc.).

Company Organization

SmarterTools reccommends emulating your company structure in SmarterTrack. For example, if your company has several departments such as billing, sales, development, or operations, you should set up SmarterTrack to have the same departments.

Typically, each department will have its own email address, such as support@example.com or sales@example.com. Departments can import from these email accounts to create new tickets, and can analyze the email for responses to existing tickets. Emails sent from agents in the departments get sent from the department email address. In this way, your employees will not have to give their personal email address to customers, and all communication can be logged and tracked.

Department are then broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. When an employee from level 1 does not know how to respond to a ticket, they can ask or send the ticket to a level 2 employee.

Depending on the size of your company, you may have several different groups within each department. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

The following examples will help illustrate how typical companies may set up SmarterTrack and will explain some fundamental organizational concepts.

A Small Travel Agency

Company Info: This is a small travel agency that deals with a limited number of clients. The company has five employees: two employees work in sales; one employee coordinates scheduling and reservations; one employee performs HR, billing, and office management duties; and another individual owns the company and serves as the CEO.

Reason for Adopting SmarterTrack: The company intends to use SmarterTrack to offer support through email tickets, specifically regarding changes to travel plans and sales inquiries. They intend to use live chat during business hours for sales inquiries if their agents are available. They would also like to track the source of customers that ask for help.

Recommended Organization: Since there are relatively few employees in the company, the need for separate escalation groups is probably not necessary. As a result, a good setup for the company in SmarterTrack would be the following:

- Sales department, sales@example.com
- Level 1 sales
- Reservations department, reservations@example.com
- Level 1 reservations

In this example, the two sales agents should be assigned to the sales department and the agent in charge of scheduling and reservations should be assigned to the reservations department. Since no customer interaction would be expected for the CEO or the HR departments, no departments will be created for them. The billing role in a small company like this could be done through a billing department or through the existing sales department.

Reservations should not be a public department, so the system administrator will configure SmarterTrack so that this department is not accessible to customers from the portal. By disabling this department from appearing in the portal, customers will not be able to submit new tickets or live chats directly to the reservations department. Instead, they will only be able to respond to emails sent to them from the reservations department.

To track data such as how customers heard about the company, the system administrator should also set up custom fields. For example, the system administrator may add a custom field called "Referrer" that displays in the default live chat and ticket templates and he may edit the template to ask the customer, "How did you hear from us?" The customer could then choose from options like "Magazine," "TV," etc. This custom data could be reported on later.

A Medium-sized Equipment Manufacturer

Company Info: This is a medium-sized manufacturer that has two different public brands. Brand ABC manufactures computer equipment and Brand XYZ manufactures copy machines. The company has 50 employees that handle customer service, product development, quality assurance, HR, and billing for both brands.

Reason for Adopting SmarterTrack: The company intends to use SmarterTrack to respond to customer service inquiries 24/7 via tickets and live chat. The company chose SmarterTrack because it could manage communications for both brands using the same installation.

Recommended Organization: In this example, the 50 employees that handle customer service, product development, quality assurance, HR, and billing for both brands should be set up as SmarterTrack agents. A good setup for the company would be the following:

- Customer service department, customerservice@example2.com

- Level 1 customer service
- Level 2 customer service
- Customer service management
- Product development department, productdevelopment@example2.com

- Group for each project
- Product development management
- Quality assurance department, qualityassurance@example2.com

- Group for each project
- Quality assurance management
- HR department, hr@example2.com

- Benefits
- Payroll
- HR management
- Billing department, billing@example2.com

- Level 1 billing
- Accounts payable
- Accounts receivable
- Billing management

The system administrator should also set up both brands in SmarterTrack. In this example, each brand should have its own customer service department, as this will allow the company to assign agents to each brand.

Because the company's goal is to provide tickets and live chats 24/7, the company should require agents to login and out of the system each day. This will ensure tickets and live chats are distributed evenly among logged in agents.

The company may choose to use custom fields to gather additional customer data, such as a product or serial number, or search templates to provide automatic lookup of other data. The company may also use external providers to integrate their existing login system or to automatically escalate tickets from specific customers. Alternately, the events system can be used to perform this function.

Types of Users

There are two primary types of people that will use your SmarterTrack installation:

- Customers (end users) will use the portal to search for information in the Knowledge Base, start tickets, or initiate live chats with company representatives. Because one of the goals of SmarterTrack is to enable users to use self-service resources to find solutions to issues before using a more expensive form of support, end users can create an account for portal access by default.
- Employees (agents) will use SmarterTrack's management interface to interact with customers

and set up all aspects of the system. Any employees that will communicate with customers via email, tickets, or live chats should be added as agents in SmarterTrack. Unlike end users, agents must be created by an administrator and be given the role of "agent" so they can access the management interface.

End Users

Each individual that visits your portal or sends an email to your company is considered an end user. Because all users are assigned roles, which define permissions and dictate which features the user has access to, companies can restrict a user's access or ability to perform certain actions. Depending on the user's role, companies can:

- Allow only certain types of users access to parts of the Knowledge Base.
- Allow only registered users to submit tickets or start live chats.
- Configure custom icons (custom links) on the homepage of the portal to only show for certain types (roles) of users.

Generally, companies will require users to login to the portal before they can perform such functions. However, system administrators can configure SmarterTrack to hide the concept of logging in from customers.

Agents

Each employee that accesses SmarterTrack's management interface is considered an agent. Because SmarterTrack tracks, documents, and reports on all customer communications and agent actions, it is important that every agent has his/her own account and login. This will ensure proper reporting and auditing and avoid confusion.

Some of your agents, such as your support/sales staff, may be full-time SmarterTrack users. These agents will spend the majority of their time actively working in the management interface, watching tickets, and responding to live chats.

Other agents, such as your development staff or managers, may be part-time SmarterTrack users. Generally, these agents will login to SmarterTrack once or twice a day, or when needed. To ensure these users receive immediate notification when new Tickets or other events occur, SmarterTools recommends that they use SmarterNotify .

Agents needing supervisory access to the SmarterTrack system should be assigned the "manager" role. This will allow them to manage and view other agents' tickets and live chats.

Understanding Agent Status

One key factor in using SmarterTrack efficiently is understanding agent status. Each agent has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats.

In order for a ticket or live chat to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets and/or live chats for the corresponding group. If all agents either are logged out or are not receiving tickets and/or live chats, the ticket or live chat will be directed to the queue. For this reason, training agents to check their status upon logging in or prior to logging out is critical to the company's success.

For more information about agent status, see Agent Status . For information about how organizations can monitor the status of their agents, see the KB article How To - Monitor Agent Status .

Understanding Tickets

Ticket systems have evolved over time from crude, static notepads for listing the chronological details of a support incident into the powerful, interactive tools of today. Many organizations have adopted simple email solutions for keeping track of their customer interactions, and such solutions may have their place when dealing with one or two replies in a relative brief amount of time (hours) and/or when individual agents manage the entire process. However, these simple mail solutions become less and less effective with complexity--the more agents, transfer opportunities, consultations, and time involved, the more prone these systems are to fail in the delivery of good customer service:

- Emails get "lost" and/or filtered
- Email is subject to deletion and mis-filing
- Responses that have longer idle times can be buried under less important mail
- Internal comments and notes cannot be kept private
- Conversation threads are difficult to manage and can become too long
- Escalations can cause emails to be unanswered or delayed unnecessarily
- Reporting on the effectiveness of customer service and support is nearly impossible
- Supervisor tracking of issue in problematic
- It can be impossible to associate other communications channels (live chats, Knowledge Base articles, etc.)
- Locating incident histories is time-consuming or impossible

The consequences of a lost, misdirected, or mishandled service request can be serious. Customers expect fast response times and standard email communication is not designed to satisfy this requirement. It is clear that email alone is not adequate.

SmarterTrack includes an advanced ticket system that is designed to transcend the limitations of simple email solutions:

- Agent views include all internal comments, notes, histories, and more
- Resolutions of previous similar incidents are available to agents
- Custom fields and other display items keep all relevant information together and easily accessible to agents
- Detailed agent-level reporting increases performance metrics
- Collapsible communication elements make organizing and managing ticket data easy
- Events can be created to allow tickets to be flagged, escalated, or redirected if time-sensitive SLAs are not met or based on other parameters

Transitioning from Email to Tickets

Transitioning to SmarterTrack from an existing email service solution is relatively easy. SmarterTools provides converters for certain email-based solutions to speed migrations. For those email solutions that do not have converters made for them, POP can be utilized to send the email messages into the SmarterTrack ticket system.

For a more gradual solution, SmarterTrack can be run in tandem (concurrently) with the email solution. New service and support requests can be directed into SmarterTrack and existing tickets can be managed via the email-only solution. Over time the process should naturally fall entirely into the SmarterTrack system. Customers will still interact with agents via their email, but agents will enjoy the SmarterTrack Web interface and the additional functionality of the program.

More Communication Options Available

This is not to say that email clients cannot or should not be used by agents. Quite the contrary. With SmarterTrack, companies can configure several scenarios that allow customers to submit service requests via the portal, via email, through third-party applications via Web services, or any combination of these. Agents can reply to these service requests through the Web interface, email, or Web-enabled mobile devices. Regardless of the information delivery method, all communications are logged in the SmarterTrack system and all of the features and functionality are available to track, record, monitor, and report on these items.

Harnessing the Power of Tickets

The full efficiency of SmarterTrack tickets is gained by harnessing several important feature sets:

Resolutions

Agents can enter resolutions into existing and closed tickets. As new tickets arrive, SmarterTrack automatically searches for previous tickets that have been successfully closed with similar topics and displays them in the Resolutions tab. This tab also has a search field that can be used to customize and narrow searches, which helps agents mine existing data.

Searches

Agents can search for existing and previous tickets with advanced searching by string, email address, customer name, date and time, handling agent, ticket number, and more. This powerful search functionality greatly speeds the delivery of service.

Attachments

Files and images can be attached to both inbound and outbound messages to speed issue handling and to treat these attachments as important communication points that can be referenced later from within the ticket. This means that files and images no longer need to be stored in a separate place, eliminating the potential that such files are lost or mishandled. This also means that multiple attachment items are kept in chronological order, so agents always know which received files are the most current.

Comments/Notes

Internal comments and notes can be typed in line--maintaining chronology with customer communications and providing additional context, documentation of voice communications, and details to other agents who may need to handle the issue.

Events and Notifications

Events can be configured to perform automated actions (transfers, escalations, special responders, etc.) or to provide specific notifications to agents and managers via SMS text message or email.

Transfers and Escalations

Escalations and transfers can be managed automatically or manually. Utilizing the events system, automatic escalations and transfers can be accomplished based upon time, idle wait, number of replies, topic, language, brand, keyword, or any number or combination of items.

Custom Fields

Custom fields can be utilized to be auto-populated through external providers. Customers and agents can also be required to ensure that certain fields are filled with relevant data before a ticket can be submitted or closed, respectively. This kind of data can be instrumental in providing the kinds of specific information that can save hours of research--speeding resolutions and increasing satisfaction. Custom fields also provide the opportunity for enhanced reporting based upon those fields.

For example: Requesting the product name and version/edition or a product prior to the customer launching a ticket may not seem too onerous a requirement from the customer's perspective and can deliver that information to the agent, meaning that this agent may not have to access a separate application to look up the customer account prior to starting his response. This information can also be used to customize auto-responders and displayed suggestions which may have a better chance of serving accurate options. Valuable back-and-forth time is greatly saved. Additionally, managers and supervisors now have the ability to report on these custom fields, gaining valuable insight to agent performance relative to product and version and perhaps detecting service trends that can push value information to development teams and manufacturing floors.

Related Items

It is not uncommon for there to be multiple communications from a customer on one or similar topics. Losing track of those communications can add extra work and waste time needlessly. Tickets can be associated to other tickets and live chats so that all of the details are accessible to agents in context and in real time. Associated items can be easily and quickly viewed in the Related Items tab within the ticket.

Reports

Ticket reports can be invaluable. Cost analysis reporting based upon product, agent, department, custom fields, and literally hundreds of other items and combinations can help managers determine the true relative costs. Summary and trend reporting by product, department, ticket type, and more can help companies spot trends, identify training needs, and manage for improved performance.

Understanding Live Chat

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, capture information on website visitors, and assist more customers concurrently. A more cost effective service channel than telephone, live chat maximizes resources by supporting concurrent sessions. Instead of handling one call at a time, your customer service agents can manage several chats at once.

Live chat is also an easy and effective way to generate sales. By providing your website visitors the opportunity to ask questions before, during, and after the buying process, your employees can explain product options, cross-sell, and upsell orders.

Real-time Typing

Agents can use live chat's real-time customer typing feature to prepare a response or look up relevant resources while the customer is typing to ensure speedy and accurate responses.

Coaching and Co-chat

SmarterTrack's coaching and co-chat features allow organizations to facilitate training and ensure the accuracy and efficiency of employees. For example, managers can proactively address issues by monitoring live chats in real time and offering assistance when needed--either by coaching an agent while he is engaged in a live chat or by participating simultaneously with the agent in a live chat.

Live Chat Translation

Businesses with multi-lingual employees can automatically route live chats in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multi-lingual employees can use the live chat translation feature to allow all agents to respond to chats in nearly every language.

For more information regarding live chat translation, refer to the KB article How To - Automatically Translate Live Chats Using Google's Language Translation Tool .

Understanding Who's On

When referring to websites, we often use terms like "virtual storefront" and "shopping cart" to describe the way customers interact with out sites and our offers. But real bricks and mortar businesses have an advantage over online businesses in that they can see what customers are doing in real as they interact with store displays and products. In these real stores, service people can see when a customer is confused by options, can answer questions and provide advice quickly, and can assist with the final transaction in the "now." Previous, internet businesses have only had analytics to tell them about such interactions in the virtual world. Web analytics—although exceptionally useful—usually only tell you what has happened in the past, perhaps after the customer has already left your site. Who's On has been created to bring the advantages of real-time customer interactions to the online environment.

The Virtual Shop

Think of Who's On as real-time analytics where employees/service agents can "see" a customer's progress through the site—whether that customer is only finding information or proceeding though the sales path to a completed transaction. The Who's On features in SmarterTrack allow you to virtually follow that customer from page to page—seeing where they spend the most time and what pages they go back to. It allows you to notice and report on literally dozens of items about that customer.

Use with Live Chat to Increase Sales

When used with SmarterTrack's included live chat feature, agents can either push or invite an individual site visitor to a live chat. Imagine that an agent notices a customer returning again and again to a specific page on the site—perhaps indicating that they need more information on that topic or are not finding what they are looking for. Agents can "virtually approach" these customers and offer help, additional resources, and advice. If a potential customer is "stuck" on an ordering page, agents can assist in the finalizing of the transaction in a friendly, unobtrusive way.

Visitor Broadcasting

Who's On also keeps track of all site visitors simultaneously and can allow site owners to display broadcast messages to all visitors at the same time. This can be perfect for periodic promotions and for displaying service messages such as site maintenance prior to service interruptions.

Visitor Surveys

When used in conjunction with SmarterTrack's onboard survey system, individual customers can be given surveys based upon the time they spent on your site, the specific pages visited, and whether or not they completed a transaction. This provides a unique and powerful channel to gather real-time customer-related business intelligence about why the decision was made to buy a product or to move on. The possibilities are truly unlimited.

To learn how to incorporate Who's On into your website, refer to the KB article How To -- Configure Who's On to Track Visitors on your Company's Website .

Understanding the Knowledge Base

The Knowledge Base is a tool companies can use to share information with employees, customers, and partners. In its simplest form, SmarterTrack's Knowledge Base is an online repository of articles that helps agents and customers solve issues quickly and efficiently.

A well-organized Knowledge Base can save organizations money by decreasing the amount of employee time spent trying to find information about company products, policies, and/or procedures. As a customer service tool, the Knowledge Base is one of the most cost-effective support channels because it gives customers easy access to information that would otherwise require contact with the company's staff.

Of course, the effectiveness of the Knowledge Base is dependant on the company's ability to create, edit, and review its articles on a regular basis. SmarterTools suggests running regular reports to determine how often your customers access specific articles; which topics/products/etc. your customers are seeking help on; and which article searches returned no results. These reports are valuable because they can be used to identify deficiencies in Knowledge Base content.

Organizing the Knowledge Base by Brand

With SmarterTrack's branding feature, companies can assign articles to one or multiple brands. This allows companies to only display the articles that relate to a specific brand, eliminating the customer's need to weed through erroneous information.

For example, a software company with multiple products may have separate websites for each product. By assigning Knowledge Base articles to different brands (products), the company can ensure that only the articles relating to a specific product are displayed to the customer.

Using the Knowledge Base with Tickets and Live Chats

When customers complete the ticket submission form, relevant Knowledge Base articles and resources are automatically displayed as possible solutions to their inquiry. As a result, your customers may receive answers to their issues before they've finished filling out the ticket--ultimately saving your company valuable time and money.

Similarly, when an agent is participating in a live chat with a customer or responding to a ticket, SmarterTrack uses the text of these conversations to search the Knowledge Base for applicable articles. By automatically displaying possible solutions from the Knowledge Base to agents, SmarterTrack helps companies ensure that their customers receive timely and accurate responses to their inquiries.

Using the Knowledge Base as a Marketing Tool

SmarterTrack's Knowledge Base takes companies into the next generation of information delivery with the ability to insert video, code block, and other special features into articles. By incorporating multimedia and search engine optimization strategies into Knowledge Base articles, companies can transform their Knowledge Base content into a valuable marketing tool.

Marketing benefits include:

- Knowledge Base articles are search engine optimized and will display in search engine result pages, allowing competitors' customers to discover your company as they seek answers to their own questions.
- Utilizing the Knowledge Base can improve your company's overall SEO strategy by helping you build links and improve Google PageRank.

By incorporating SEO strategies into our own Knowledge Base, SmarterTools has successfully topped search engine results for a variety of searches. For example, the article How To -- Where are My IIS Log Files Stored? currently ranks no. 1 for the search phrase "IIS log files." As a result, that article has received more than 24,000 views and is our most popular article to date.

Understanding Multi-language Support in SmarterTrack

In a global economy and marketplace many companies face challenges disseminating information to customers in several languages while controlling costs. While the ideal solution may be to have multi-lingual speakers in every service department to effectively help customers around the world or to hire human translators to translate every Knowledge Base article, such solutions usually are not feasible nor cost-effective.

With support for nearly 60 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Multi-language support is provided through:

- Language packs
- Translatable strings
- Live chat translation
- Online help translation For step-by-step instructions on configuring the SmarterTrack interface to support multiple languages, please refer to the KB article How To -- Set Up SmarterTrack to Support Multiple Languages .

Language Packs

Language packs are used to translate the SmarterTrack interface into another language and can be downloaded from the SmarterTrack Download page.

Translatable Strings

Some phrases and words may not be available for translation through a specific language pack. When this happens, system administrators can use translatable strings to define these phrases and words. For example, a U.S. company with customers in Spain may create a translatable string to translate the company's department names (billing, sales, etc.) into Spanish (facturacion, ventas, etc.).

Live Chat Translation

Businesses with multi-lingual employees can automatically route live chat in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multi-lingual employees can use the live chat translation feature to allow all agents to respond to chats in nearly every language.

For more information regarding Live Chat translation, refer to the KB article How To - Automatically Translate Live Chats Using Google's Language Translation Tool .

Online Help Translation

Customers who access the SmarterTrack customer service portal included with each installation may have questions regarding what they can and cannot accomplish via the portal--even if the portal has been effectively translated into their language of choice. This can sometimes cause needless support inquiries regarding simple tasks such as navigating the KB article, etc. SmarterTrack Online Help--including this page you are reading now--can be automatically translated into more than 60 languages in real time with full text and pop-up English versions easily available for reference.

Defining Workflows and SLAs

Although SmarterTrack doesn't have specific settings pertaining to SLAs or workflows, its event-driven architecture makes defining SLAs and workflows easy and efficient.

Using the events system, managers can configure events at the system and user levels and set up automated actions based on those events to ensure employees are meeting SLAs and staying on top of their workflow. For example, the events system can be used to:

• Ensure customer satisfaction by created quality control related events based upon time and/or content.
• Bring secondary groups or individual agents on line when load or wait times exceed company standards.
• Automatically escalate tickets when the number of responses or idle time reaches certain parameters.

Similarly, agents can use the events system to ensure they are responding to tickets in a timely manner by configuring an event action that notifies them when they receive a new ticket.

In addition, SmarterTrack's task management system allows agents and managers to proactively manage the workflow process while improving organization, efficiency and productivity. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to add related tickets, live chats, and call logs to any task in the system. This ability ensures agents can have all the information necessary to complete a task in one convenient location. To help agents meet business deadlines, SmarterTrack also allows agents to configure reminders and events based upon each task.

Installation and Deployment

SmarterTrack System Requirements

SmarterTrack was designed to operate efficiently in shared, VPS or dedicated environments without any loss in functionality or performance based on the following minimum requirements:

- Windows XP, Windows Vista, or Windows Server 2003 or higher
- Microsoft .NET 4.0
- SmarterTrack Web server included with product*
- Microsoft SQL Server 2005 or higher, Microsoft SQL Server Express Edition or MySQL 5.0 or higher

However, SmarterTools recommends the following requirements for maximum efficiency:

- Windows XP, Windows Vista, or Windows Server 2003 or higher
- Microsoft .NET 4.0
- Microsoft IIS 7.0*
- Microsoft SQL Server 2005 or higher or MySQL 5.1 or higher

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. than suggested in the online help. No warrantee or guarantee is expressed or implied as to the efficacy or viability of these recommendations for a particular environment or application.

*SmarterTrack includes a basic Web server, so the product is fully functional upon installation—even without the existence of IIS or other Web servers. However, SmarterTools recommends installing Microsoft IIS 7.0 in place of the SmarterTrack Web server for increased performance and security in medium to high-volume environments. For more information, see Running SmarterTrack as an IIS Site .

Installation

SmarterTrack is available as a traditional software installation or as a hosted service. Businesses that choose the traditional deployment of SmarterTrack can install the software onto a local or co-located server in dedicated, VPS, and shared environments using the standard install download. Note: System administrators planning to deploy SmarterTrack in load balanced environments or with failover functionality may have special considerations to make regarding installation. For more information, SmarterTools recommends referring to to the SmarterTrack Load Balancing or SmarterTrack Failover white papers as applicable.

Installation on a Dedicated Server

Please refer to the KB article How To - Install SmarterTrack on a Dedicated Server for step-by-step installation instructions for this environment.

Installation to a Shared Server

Please refer to the KB article How To - Install SmarterTrack to a Shared Server for step-by-step installation instructions for this environment.

Installation to SmarterTools Servers

Customers using Hosted SmarterTrack will have access to the program shortly after activating a free trial or purchasing a paid subscription. Because SmarterTrack is already installed on servers owned and maintained by SmarterTools, hosted service customers do not need to worry about installation. However, they will need to follow the instructions provided in their welcome emails to activate and set up their hosted service.

Running as an IIS Site

By default, SmarterTrack installs a basic Web server that allows companies to start using the application immediately after installation. However, SmarterTools recommends moving to a more robust and secure Web server, such as Microsoft IIS. For step-by-step instructions on configuring SmarterTrack to run with Microsoft IIS 7.0, please refer to the KB article How To - Set Up SmarterTrack as an IIS Site .

Note: This help topic assumes familiarity with Microsoft IIS and how it works. SmarterTools recommends using the basic Web server included with the SmarterTrack if you are unfamiliar with or uncomfortable using Microsoft IIS.

Setting Up the Database

SmarterTrack needs a database to store data. SmarterTools customers using an installed version of the software can run SmarterTrack with any of the following databases:

- Microsoft SQL Server - Version 2005 or higher recommended
- Microsoft SQL Server Express - Version 2005 or higher
- MySQL - Version 5.1 or higher recommended. Note: SmarterTrack 6.x will only support the InnoDB database engine and will attempt to use InnoDB for all upgrades and new installations. For information on converting a database to InnoDB, see the KB article How To - Convert from MyISAM to InnoDB .

Please refer to the KB article How To - Set Up the SmarterTrack Database on a Dedicated Server or How To - Set Up the Database for Shared Hosting for step-by-step instructions and more information regarding the database backend.

Activating SmarterTrack

In order for SmarterTrack to function for more than one agent, the product must be activated using a valid license key. In addition, if SmarterTrack is moved to another server or assigned to a different database, the product many need to be reactivated.

To access the product activation wizard, click the settings icon . Then expand the System Settings and Activation folders in the navigation pane and click Licensing . The edition, version, and license level information for the version of SmarterTrack currently being used will load in the content pane.

To activate or reactivate a valid license key, click Activate Key in the content pane toolbar. For step-by-step activation instructions, please refer to the KB article How To - Activate 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

Because the SmarterTrack 6.x download contains all of the installation files needed for any licensing level or edition, upgrading editions or levels is relatively easy. With a valid license key, companies can easily upgrade to the Professional or Enterprise editions or increase the number of agents available in SmarterTrack. For more information, see Licensing . For step-by-step instructions, please refer to the KB article How To - Upgrade SmarterTrack Levels and Editions .

The steps for upgrading to SmarterTrack 6.x from an older version of the application vary depending on which installation package is used--the automatic installation package or the manual installation package. For more information, please refer to the KB article How To - Upgrade SmarterTrack .

Automation with Web Services

SmarterTrack was designed to support custom configuration and automation. System administrators have the ability to access the SmarterTrack application via exposed Web services, allowing for the automation of a variety of different tasks, including:

- Retrieving ticket information
- Querying a ticket(s)
- Creating and replying to tickets

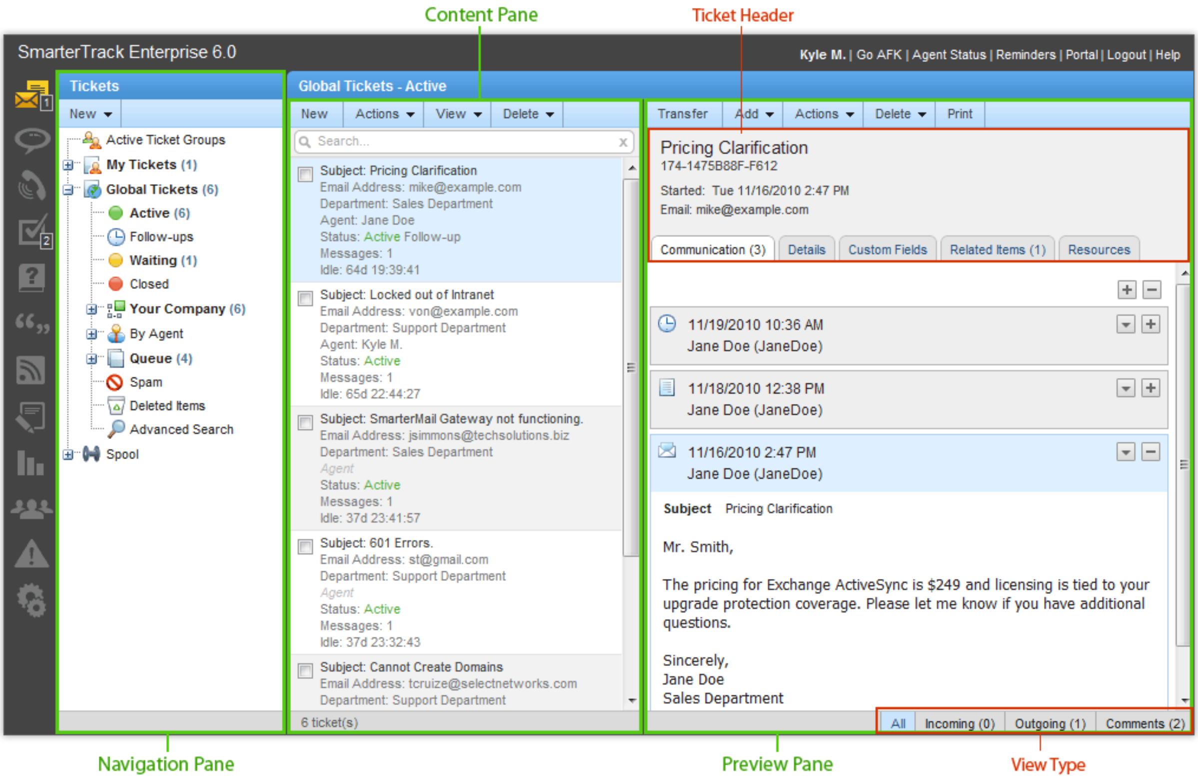
- Setting custom fields or comments for tickets
- Getting lists of departments, groups, and agents
- Monitoring the number of active tickets for an organization
- And more...

For more information, including a brief explanation of the available Web services, download the Automation with Web Services document.

Interface Diagrams

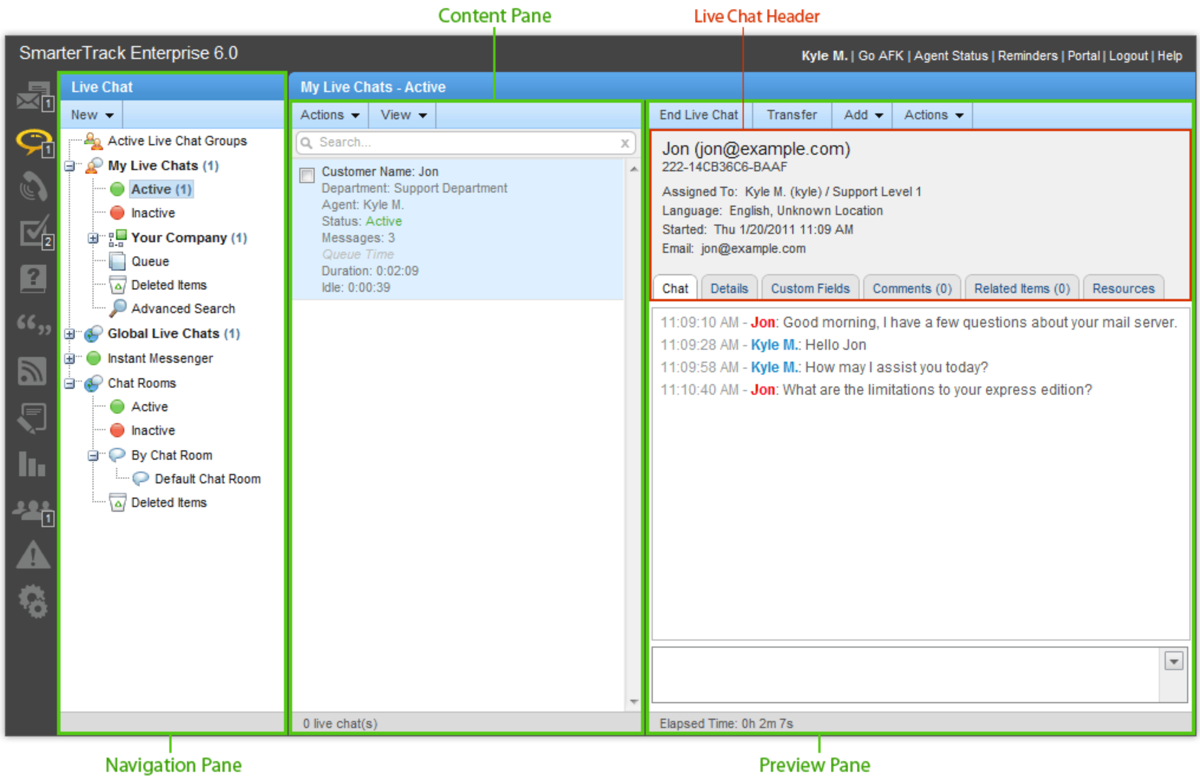
Tickets

To better understand the different areas of tickets, please refer to the diagram below:



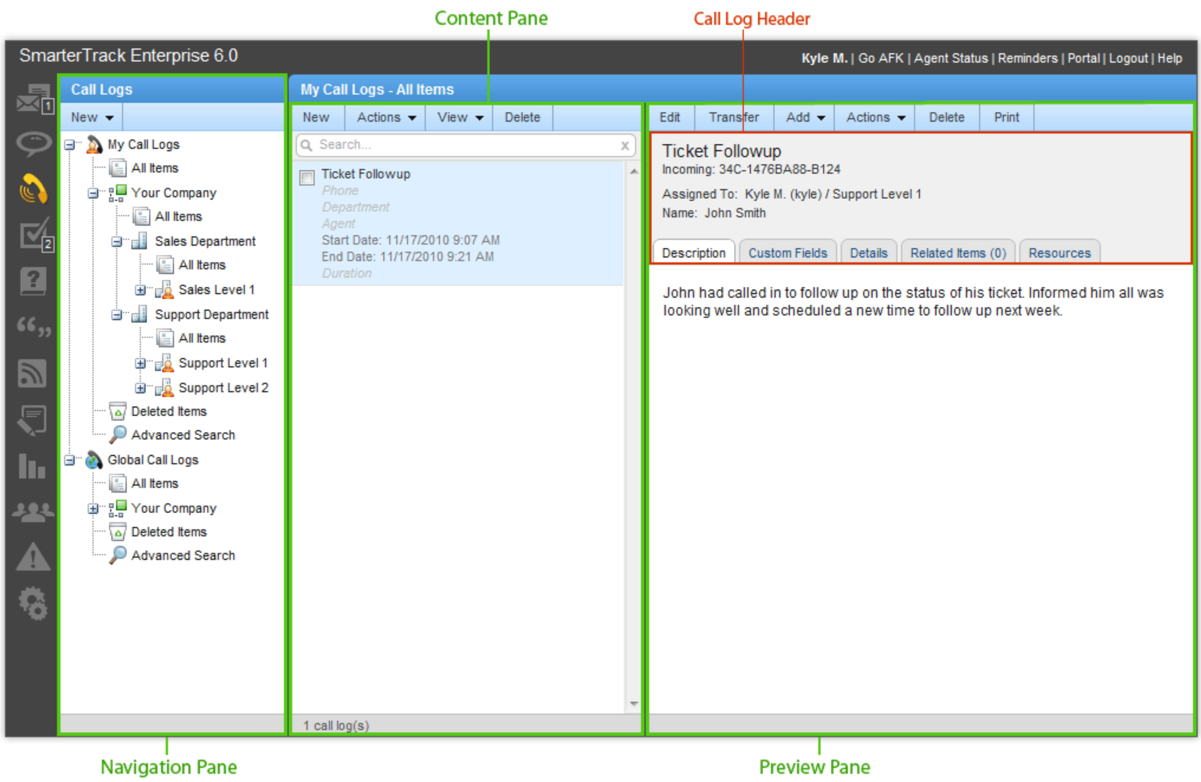
Live Chat

To better understand the different areas of live chat, please refer to the diagram below:



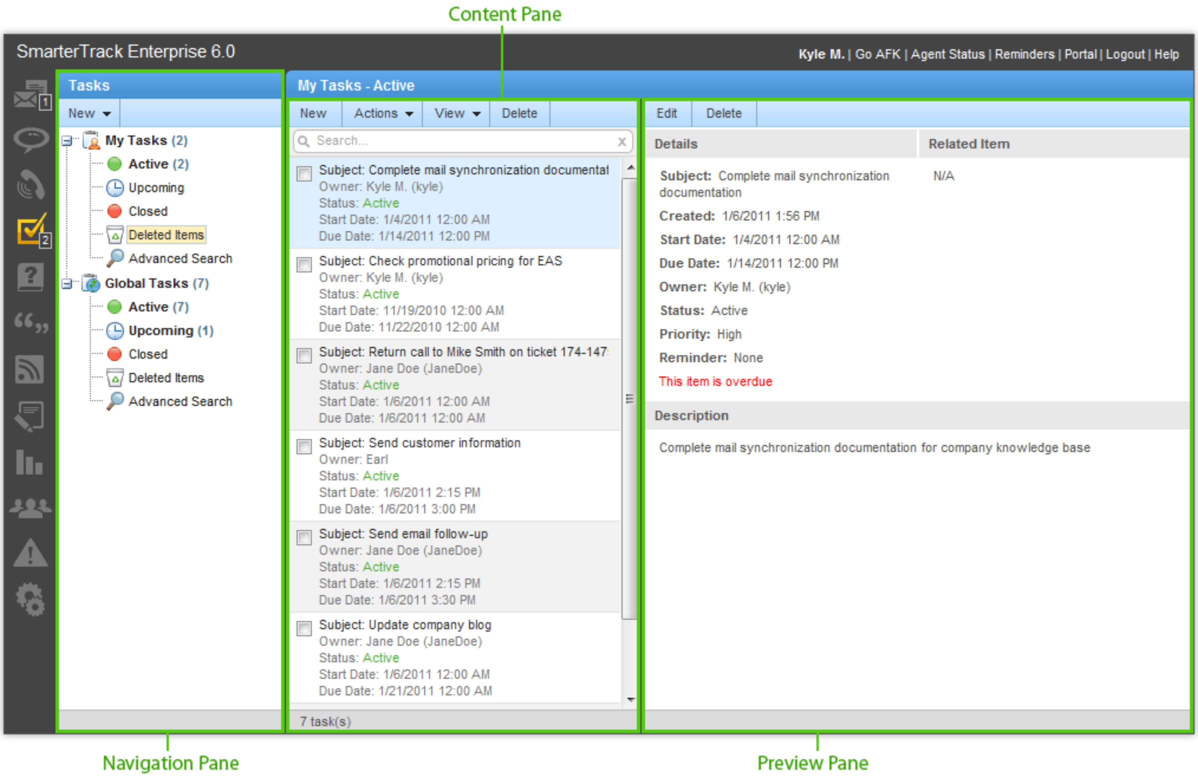
Call Logs

To better understand the different areas of call logs, please refer to the diagram below:



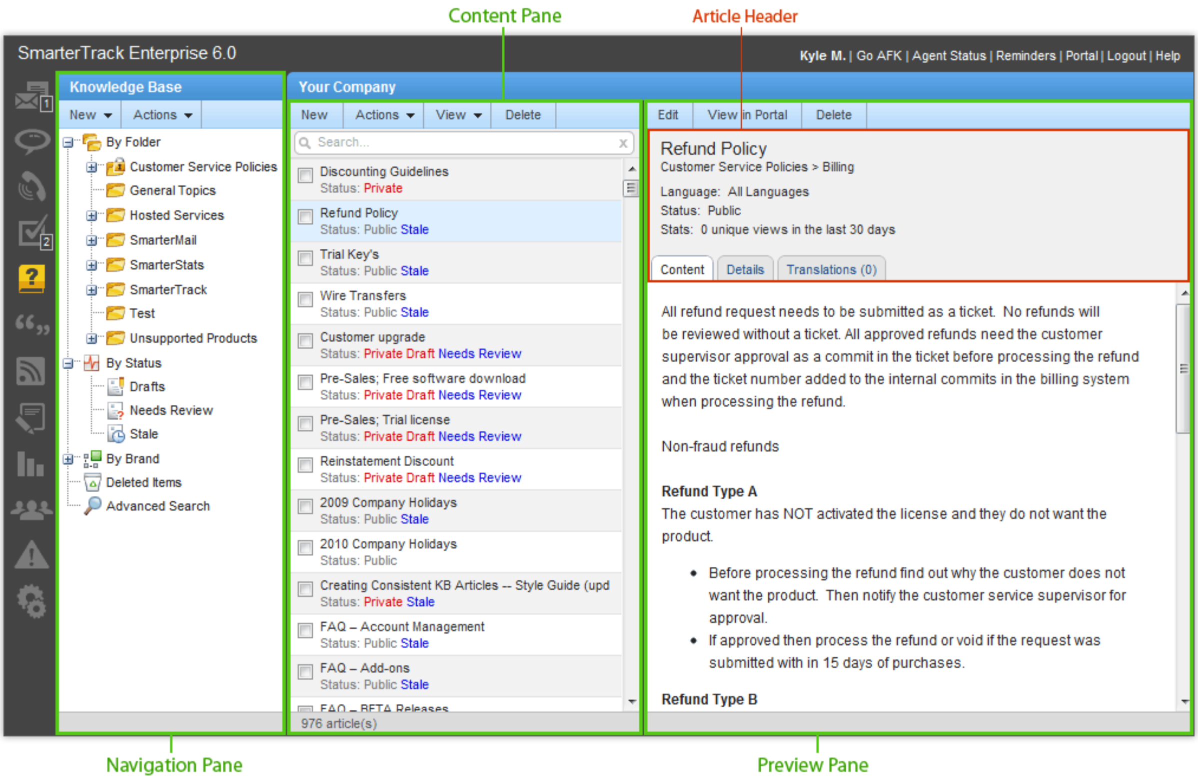
Tasks

To better understand the different areas of tasks, please refer to the diagram below:



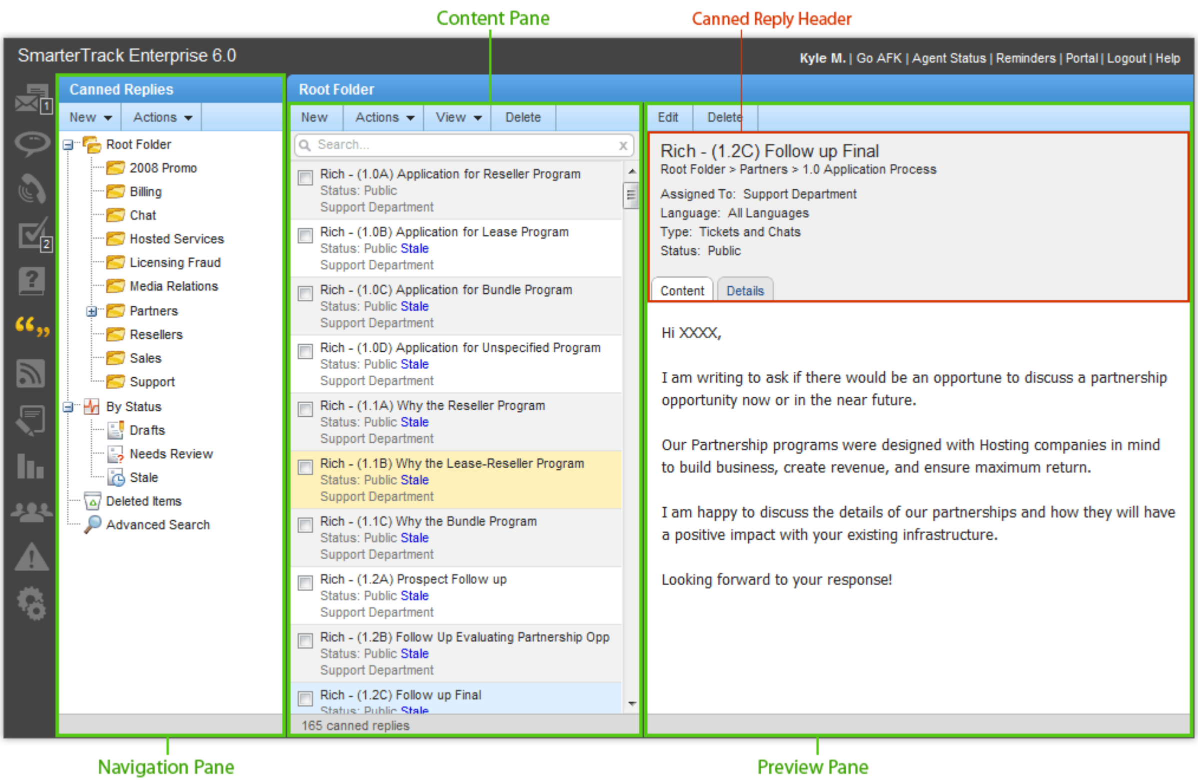
Knowledge Base

To better understand the different areas of the knowledge base, please refer to the diagram below:



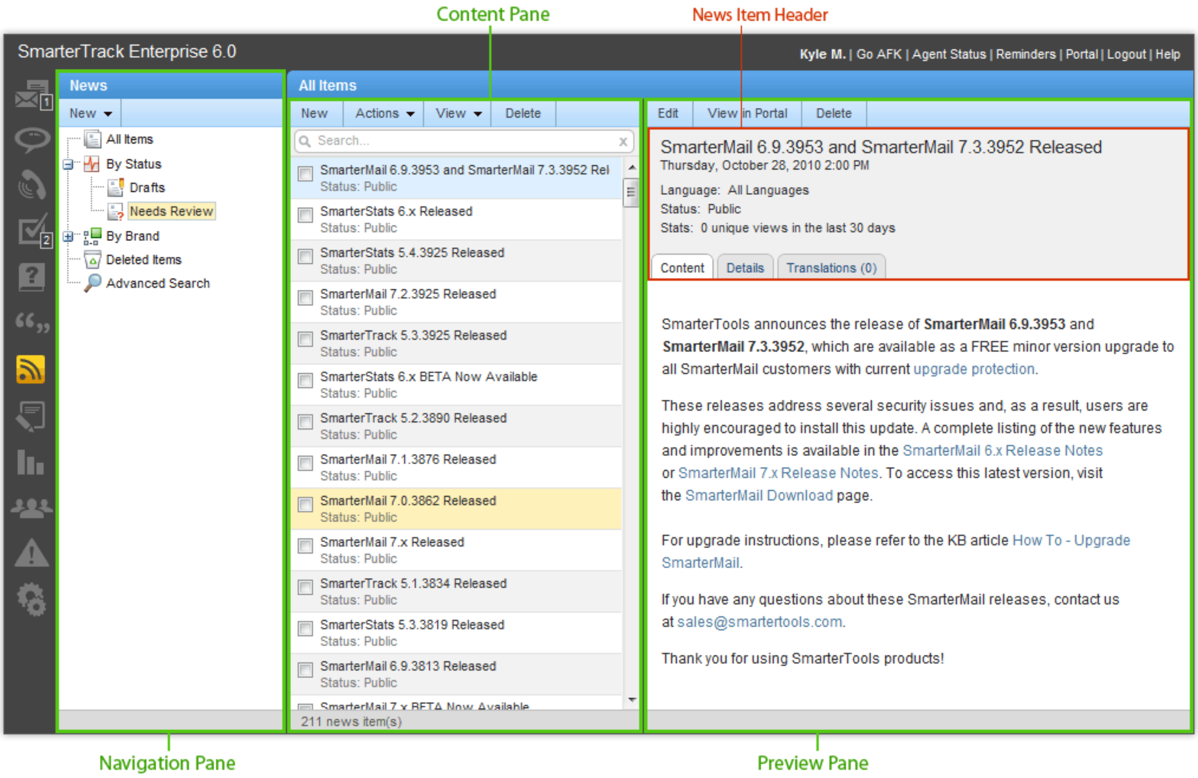
Canned Replies

To better understand the different areas of canned replies, please refer to the diagram below:



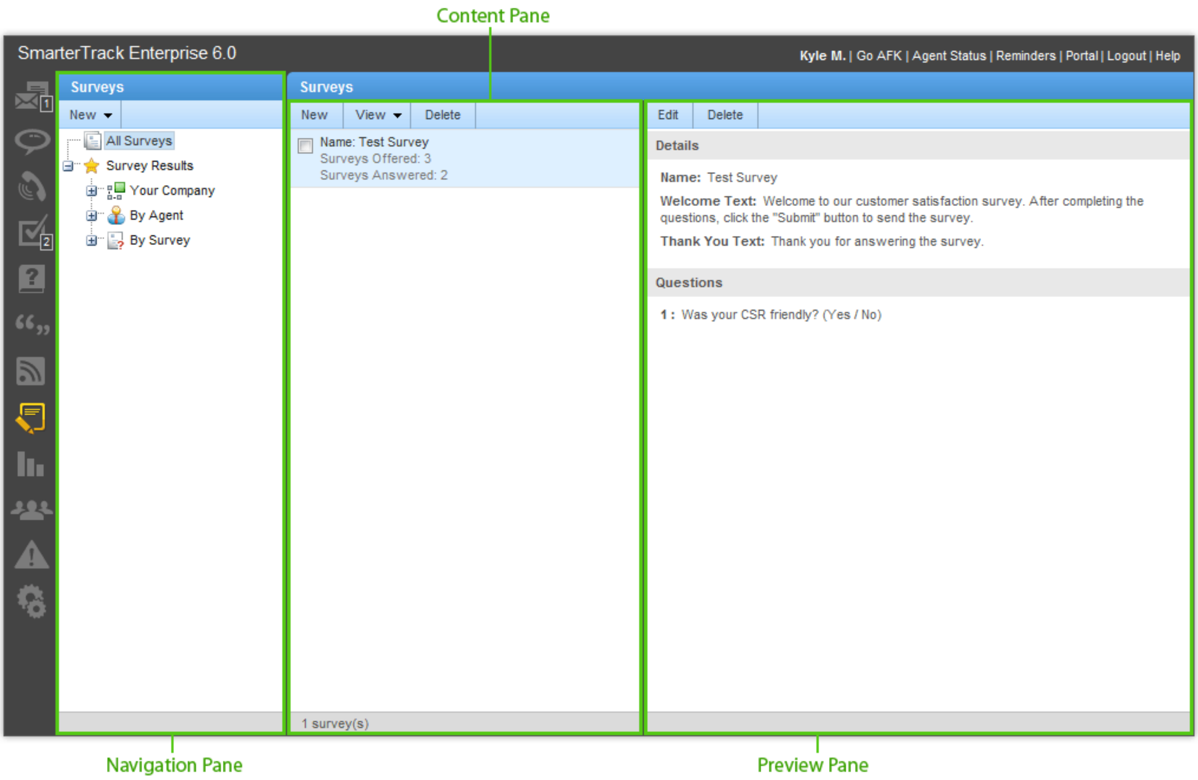
News

To better understand the different areas of news items, please refer to the diagram below:



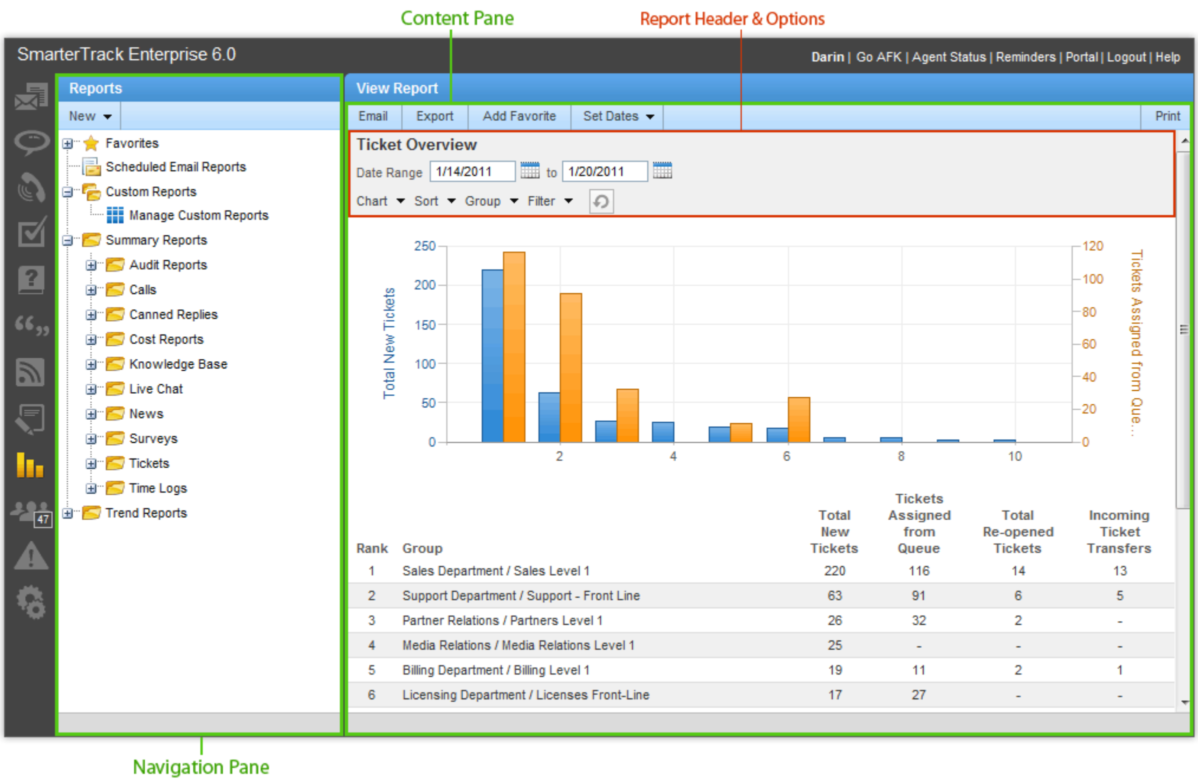
Surveys

To better understand the different areas of surveys, please refer to the diagram below:



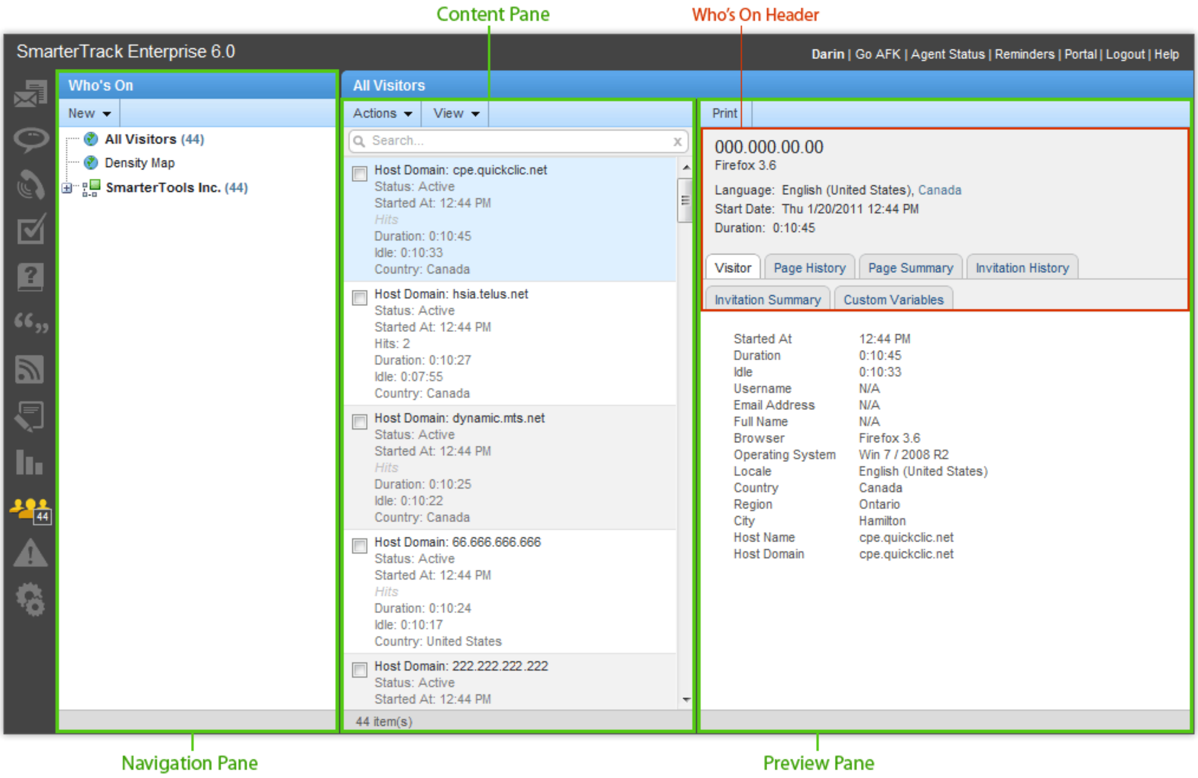
Reports

To better understand the different areas of reports, please refer to the diagram below:



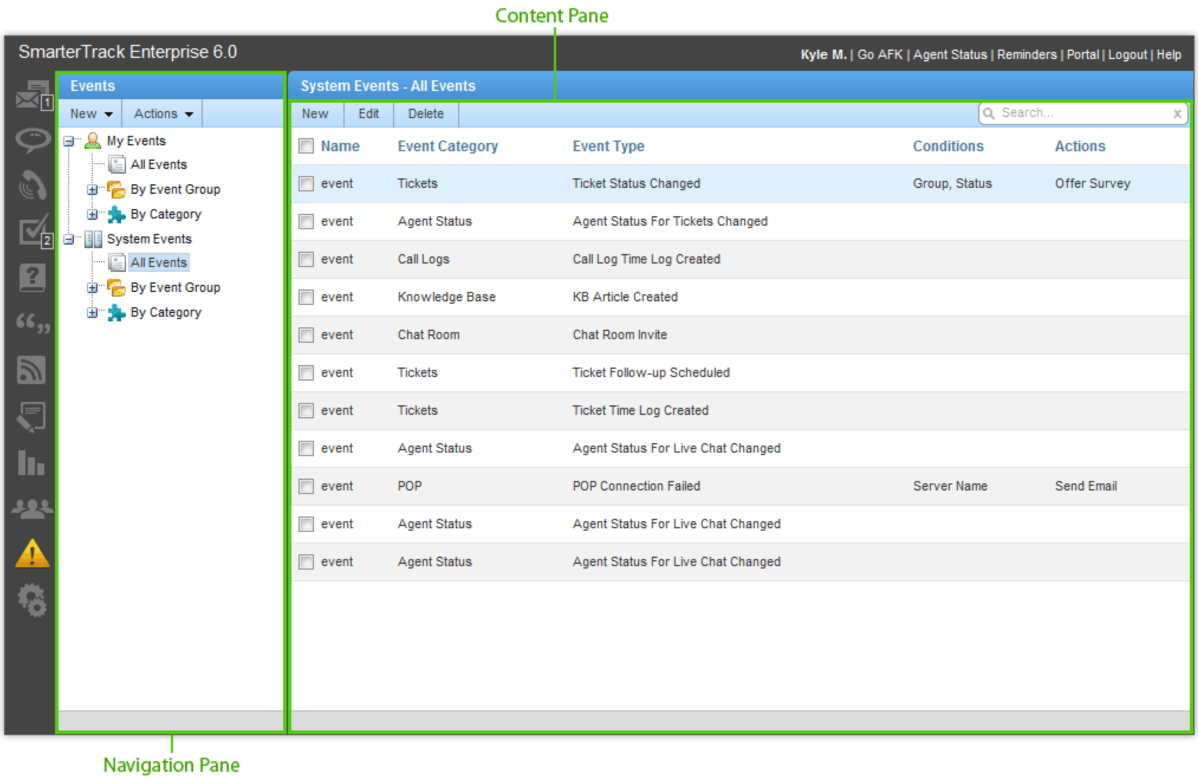
Who's On

To better understand the different areas of Who's On, please refer to the diagram below:



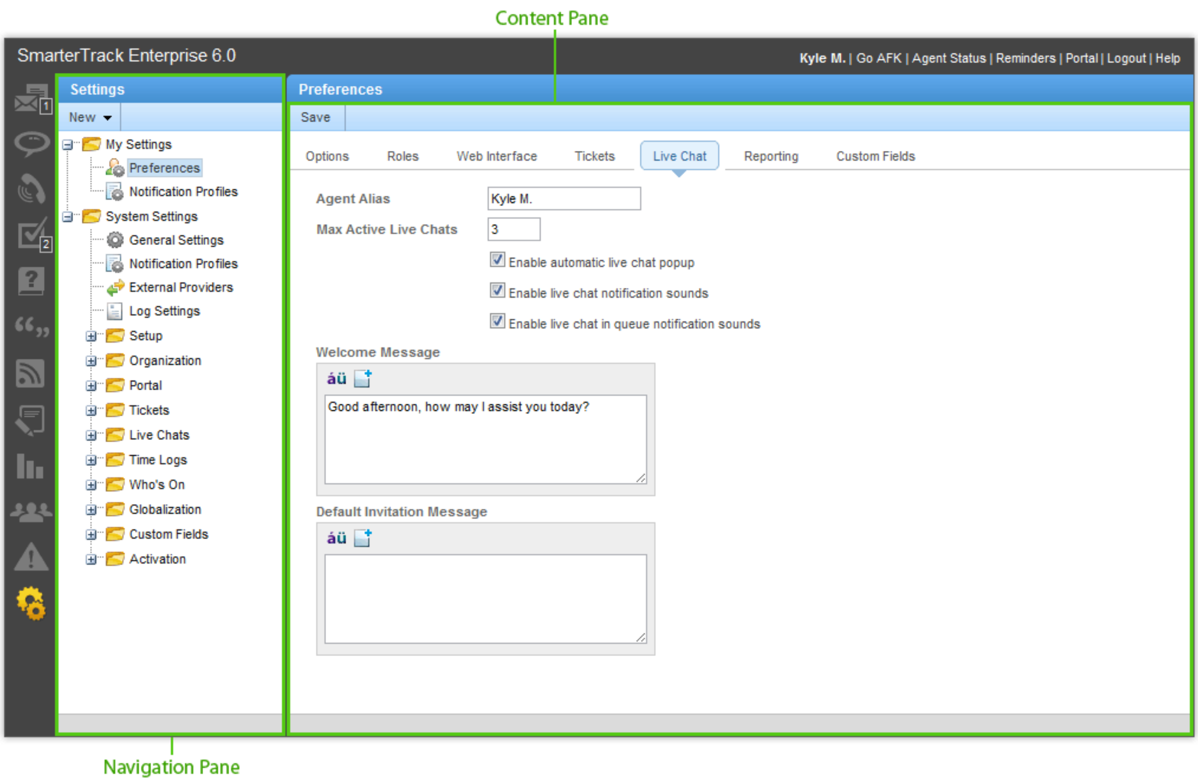
Events

To better understand the different areas of events, please refer to the diagram below:



Settings

To better understand the different areas of settings, please refer to the diagram below:



Help for Users & System Administrators

Logging in to SmarterTrack

SmarterTrack's Web interface is divided into two components: the management interface and the portal interface. System administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets and chats. Customers can also use the portal interface to retrieve ticket information, submit new tickets and chats, or search knowledge base articles.

Logging in to the Portal Interface

Customers, agents, and system administrators can login to the portal interface via the portal website URL, which can be obtained from the SmarterTrack administrator. To log in to the portal, type the username and password in the appropriate fields and click Login .

Logging in to the Management Interface

Agents and/or system administrators will need to obtain the link to the management interface login page from their SmarterTrack administrator. Alternatively, they may be able to access this link from the portal. To log in to the management interface, type the username and password in the appropriate fields and click Login . Note: Agents and/or system administrators that wish to access the management interface may need to re-enter their login credentials, even if they are already logged in to the portal.

Agent Status

In order for a ticket or live chat to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets and/or live chats for the corresponding group. If all agents either are logged out or are not receiving tickets and/or live chats, the ticket or live chat will be directed to the queue. For this reason, it is imperative that agents check their status upon logging in or prior to logging out.

The agent status popup gives agents the ability to quickly view the live chat and ticket groups they belong to. Agents can also start and stop activity within live chat and ticket groups from this popup.

To help make this process simple and automatic, the agent status popup displays in the management interface upon login. It can also be accessed at any time by clicking the Agent Status link in the upper right corner of the management interface.

In general, the following columns will be avilable:

• Department - The name of the department. For example, sales, support, or billing.
• Group - The name of the group.
• Live Chats - If live chats are enabled for a group, this column will have a checkbox. To start receiving chats for a particular group, select the appropriate live chats checkbox. To stop receiving chats for a particular group, uncheck the appropriate live chats checkbox.
• Tickets - If tickets are enabled for a group, this column will have a checkbox. To start receiving tickets for a particular group, select the appropriate tickets checkbox. To stop receiving tickets for a particular group, uncheck the appropriate tickets checkbox.

Click OK to update the agent status.

AFK

To temporarily stop receiving live chats, select click the AFK (Away From Keyboard) link in the upper right corner of the management interface. When an agent is AFK, the link will display "Currently AFK". Note: When the AFK link is used, agents will not receive any new live chats, but existing live chats will stay in their possession.

To begin receiving live chats again, click the AFK link. If the link displays "Go AFK," the agent can now receive new live chats.

Tickets

Tickets Overview

SmarterTrack's ticket feature provides businesses with a powerful information distribution system that gives agents total control of all related communications, including emails, notes, and associated live chats. To access your tickets, click the tickets icon . Depending on the role you are assigned, My Tickets or Global Tickets will load.

For help understanding the different areas of the tickets section, see the tickets diagram.

Navigating Your Tickets

The My Tickets section organizes all of the tickets for which an agent is responsible. When an agent accesses My Tickets by clicking My Tickets in the navigation pane, all active tickets for the agent will load in the content pane.

System administrators and managers may want to view all of the tickets in the SmarterTrack system to evaluate the actual ticket needs of the organization or to gain valuable insight into company operations. To view all tickets in SmarterTrack, click Global Tickets in the navigation pane. All active tickets in the system will load in the content pane.

- Subject - A user-generated phrase that usually describes the ticket. The subject phrase is entered by the user (customer) when the ticket is submitted. Very long subject phrases are truncated.
- Email - The email address of the individual that submitted the ticket.
- Department - The group that is assigned to this ticket.
- Agent - The agent that is assigned to this ticket.
- Status - The current status of the ticket.
- Messages - The number of emails that have gone back and forth between the agent and customer.
- Idle - The amount of time that has passed since a ticket action has occurred.
- Follow-ups - The number of follow-ups that are associated to the ticket.

Performing Ticket Actions

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

- New - Creates a new ticket.
- Actions - Click this button and select the appropriate option to transfer tickets, mark tickets for follow-up or change the status or priority of tickets.

- Select All - Selects all of the tickets in the content pane.
- Transfer - Transfers the selected ticket(s) to another group or agent. For more information on transferring a ticket, see Transferring Tickets .
- Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option:

- Schedule Follow Up - Choosing this option will assign a timeframe for which the agent will follow up on the ticket. When a ticket is ready for follow up, SmarterTrack automatically moves it to active status.
- Remove Follow Up - Choosing this option will remove any follow-up assigned to a ticket. The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up.
- Status - To change the status of a ticket or to pin a ticket, select the appropriate option:

• Active - Choosing this option will mark all selected tickets as active. Generally, a ticket would be marked active when an agent is working on it.
• Waiting - Choosing this option will mark all selected tickets as waiting. Generally, a ticket is marked as waiting when the agent is waiting for a customer reply or action. tickets marked as waiting will not appear in the active tickets section and may be set to close automatically. Note: The system administrator sets the length of time a ticket will remain in waiting status before it auto-closes.
• Closed - Choosing this option will mark all selected tickets as closed. Generally, a ticket is marked as closed when the agent has resolved the customer's issue.
• Closed and Locked - Choosing this option will mark all selected tickets as closed and prohibits the customer from reopening the ticket. This option is generally used if a customer has a tendency of reopening existing tickets when new tickets should be created. Note: If the ticket message is bounced, the ticket will return to active status. For example, after responding to a ticket, an agent may mark the ticket as closed and locked. If that ticket response is undeliverable, the system will receive a non-delivery report and the ticket will revert to active status.
• Pin Ticket - Choosing this option will ensure that the ticket will not be assigned to another agent. A pinned ticket will remain assigned to you even if you log out and hand-off your tickets. If a ticket is pinned, all correspondence relating to the ticket will be assigned to you, reglardless of your status. Note: If the system administrator enables automatic ticket rebalancing, pinned tickets may be reassigned.
• Unpin Ticket - Choosing this option will allow the ticket to be assigned to another agent.
• Priority - To change the priority level of a ticket, select the appropriate option:

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

• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.

• Refresh - Refreshes the page.
• Visible Fields - Choose which columns are displayed in the navigation pane.
• Delete - Click this button and select the appropriate option to delete tickets or mark tickets as spam.

- Delete - Deletes the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .
- Spam - Sends the selected ticket(s) to a spam folder for system administrators to monitor. For more information on spam tickets, see Deleting Tickets .

Active Ticket Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. System administrators can view and edit the status of agents within each group from the Active Ticket Groups area of the tickets section of the management interface.

The Active Tickets Groups page gives system administrators and managers the ability to view the following information:

- A list of all agents
- The status of each agent
- The number of active tickets assigned to each agent
- The number of active ticket groups
- The total number of ticket groups that the agent belongs to

To access this information, click the tickets icon , then click Active Ticket Groups in the navigation pane.

To change the status of an agent, select the agent and click Edit in the content pane toolbar or double-click a specific agent. For more information on agent status, see Agent Status .

Viewing Tickets

Depending on your role, a list of all active tickets in the system or all active tickets to which you are assigned will load in the content pane upon login. To view the contents of a ticket, simply click the desired ticket and it will load in the preview pane. If you would rather view the ticket in a pop-up window, double-click the ticket instead.

In general, the following options are available from the preview pane toolbar:

• Reply - Allows the agent to compose a reply to the ticket. For more information on replying to a ticket, see Replying to Tickets .
• Reply All - Allows the agent to compose a reply to all of the emails listed in the To field of the ticket.
• Transfer - Transfers the ticket to another group or agent. For more information on transferring a ticket, see Transferring Tickets .
• Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the ticket.

• Comment - Adds a note or a resolution to the ticket. When an agent adds a resolution to a ticket, this information is stored in a searchable database that can be used to quickly and efficiently resolve a ticket issue.
• File - Attaches a file to the ticket. When an agent adds a file to a ticket, this information is stored in the Related Items and Communication tabs of the ticket.
• Task - Attaches a new task to the ticket. When an agent adds a task to a ticket, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
• Call Log - Attaches a new call log to the ticket. When an agent adds a call log to a ticket, this information is stored in the Related Items tab.
• Existing Item - Adds an existing ticket, call log or live chat to the ticket. When an agent adds a related item to a ticket, this information is stored in the Related Items tab.
• Actions - Click this button and select the appropriate option to mark the ticket for follow-up, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• Status - To change the status of a ticket or to pin a ticket, select the appropriate option. For information on the different status types, see Tickets Overview .
• Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .
• Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option. For more information on follow-ups, see Scheduling Tickets for Follow-up .
• View User Details - Allows the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.
• Get Assistance - Allows the agent to chat with another agent, supervisor, or system administrator that is logged into SmarterTrack.
• Delete - Click this button and select the appropriate option to delete tickets or mark tickets as spam.

- Delete - Deletes the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .
- Spam - Sends the selected ticket(s) to a spam folder for system administrators to monitor. For more information on spam tickets, see Deleting Tickets .
- Print - Prints the information contained in the communication, custom fields, and details tabs of the ticket. Tabs within the Ticket

Ticket information is organized within the following tabs:

- Communication - This tab includes all correspondence and comments pertaining to the ticket, with the most recent communications listed first. Agents collapse or expand correspondence using the icons on the top right corner of each communication.
- Details - This tab gives the agent a general overview of the ticket and summarizes any actions associated to the ticket.
- Custom Fields - This tab includes any custom fields the system administrator created to help customize your company's tickets. This information can be populated by a user, an agent, or a third-party application (via the system administrator).
- Files - This tab lists any files that were uploaded to the ticket by an agent or customer.
- Related Items - This tab lists any tickets, live chats, call logs, time logs, tasks or files attached to the ticket.
- Resources - This tab displays possible resolutions or relevant knowledge base articles to the ticket issue. Agents can use search terms to find the resolution or knowledge base article that best relates to the ticket.

Viewing Tickets by Status

Generally, tickets are organized into different sections depending on whether they are active, waiting for a customer response, need a follow-up, or are closed. To view tickets by status, click the tickets icon , expand Global Tickets or My Tickets in the navigation pane and select the desired status. All tickets with the selected status will load in the content pane.

Viewing Tickets by Brand

To view tickets by brand, click the tickets icon and click the appropriate brand in the navigation pane. All active tickets for the selected brand will load in the content pane. Agents can also expand the brand and select the type of tickets they want to view (options include active, waiting, and closed tickets). Expanding the brand also allows agents to view tickets by department or group. Note: Agents can only view the tickets for which they are responsible.

Viewing Tickets By Agent

To view tickets by agent, click the tickets icon , expand By Agents and click the appropriate agent in the navigation pane. All active tickets for the selected agent will load in the content pane. System administrators can also expand the agent and select the type of tickets they want to view (options include active, waiting, and closed tickets). Note: The ability to view tickets by agent is only available to system administrators and managers.

Viewing Deleted Tickets

The Deleted Tickets section is a list of all tickets that have been deleted by an agent. To view deleted tickets, click the tickets icon and click the Deleted Items in the navigation pane. All deleted tickets will load in the content pane. For more information on deleted tickets, see Deleting Tickets .

Viewing Spam Tickets

The Spam Tickets section is a list of all tickets that have been marked as spam by an agent. To view spam tickets, click the tickets icon and click Spam Tickets in the navigation pane. All spam tickets will load in the content pane. For more information on spam tickets, see Deleting Tickets .

Replying to Tickets

To respond to a ticket, click Reply in the preview pane toolbar. This will open a ticket response window that the agent will use to compose an email response to the customer. Alternatively, the agent may want to reply to all recipients of the ticket (those listed in the To, Cc and Bcc fields). To do so, click Reply All in the preview pane toolbar.

When replying to a ticket, SmarterTrack automatically fills in the address fields with the email address(es) of the recipient(s) from the last ticket message, the subject field with the subject from the original ticket message and the text box with the ticket correspondence thus far.

Composing a Ticket Response

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

The following fields will appear in the header of the ticket:

- To - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should auto-fill this field. If the ticket will be sent to multiple people, separate email addresses with a semi-colon.
- Cc - The email address of any individuals that should receive a copy of the ticket response. If

the ticket will be copied to multiple people, separate email addresses with a semi-colon.
• Bcc - The email address of any individuals that should receive a blind carbon copy of the ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semi-colon.
• Subject - The subject of the message. If the agent is replying to a ticket, SmarterTrack should auto-fill this field.
• Attachments - To add an attachment to the ticket response, click Choose File , select the appropriate file, and click Open . Then click Upload to attach the file to the message.

Type the text of the ticket response in the large editing box below the ticket header. Agents can change the formatting using the WYSIWYG editor. For information about setting the default font type and font size, see Preferences .

The following options are available in the toolbar of the ticket response window:

• Send - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; Send and Schedule Follow-up; or Send and Transfer. For more information about the different options, see Tickets Overview .
• Add - Adds a comment, task, file, time log, call log or other related item to the ticket. For more information about the different options, see Viewing Tickets .
• Actions - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• Status - To pin or unpin a ticket, select the appropriate option. For information on the different status types, see Tickets Overview .
• Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .
• Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.
• View User Details - Allows the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.
• Get Assistance - Allows the agent to chat with another agent, supervisor, or system administrator that is logged into SmarterTrack.
• Print - Prints the information contained in the communication, custom fields, and details tabs of the ticket.

Transferring Tickets

On occasion, an agent may need to transfer a ticket to another agent or group. There are various reasons why a ticket may be transferred. For example, a level 1 tech support agent may need to escalate the ticket to a more experienced level 2 agent for resolution. As another example, an incorrectly categorized ticket, such as a support ticket that was incorrectly submitted as a sales ticket, may need to be rerouted to the correct department. Note: The ability to transfer tickets is determined by the role permissions. By default, agents can transfer tickets. For more information, see Roles .

To transfer a ticket, select the ticket and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the ticket in the preview pane. This will open a pop-up window with the following fields:

• Instance - Select the SmarterTrack installation to which the ticket should transfer from the list. Note: This field is only available if the system administrator has enabled cross-installation ticket transferring in Ticket Settings .
• New Group - Select the group to which the ticket should transfer from the list.
• New Agent - Select the agent to which the ticket should transfer from the list. If the ticket does not need to transfer to a specific agent, choose the auto-assign option and the ticket will be assigned to an agent within the specified group based on the distribution method set by the system administrator.
• New Status - Select the status of the ticket. Generally, an agent will want to mark a transferred ticket as active.
• Pin Ticket - Check this box to pin the ticket to the agent receiving the ticket. For more information on pinning tickets, see Tickets Overview .
• Transfer Note - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the ticket was transferred.

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

Scheduling Tickets For Follow-up

One method for managing tickets in SmarterTrack is by scheduling them for follow-up. For example, if an agent needs to do additional research to resolve a customer's issue, he can schedule the ticket for follow-up to ensure it is not forgotten. Similarly, follow-ups can be used to notify agents when customers haven't responded to a ticket or need additional service.

To schedule a ticket for follow-up, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Schedule Follow-up . The follow-up options will load in a popup window. In general, the following options are available:

- Follow Up On - Use the calendar and clock icons to select the date and time on which the agent should follow up on the ticket. When this date/time arrive, SmarterTrack will automatically move the ticket to active status to remind the agent to follow-up.
- New Group - Select the group to which the follow-up should be assigned to.
- New Agent - Select the agent to which the follow-up should be assigned to. If the follow-up does not need to be assigned to a specific agent, choose the auto-assign option and the follow-up will be assigned to an agent within the specified group based on the distribution method set by the system administrator.
- New Status - Select the status of the ticket. Generally, an agent will want to mark a ticket scheduled for follow-up as active or waiting. While a ticket scheduled for follow-up will only display in the follow-ups area of the tickets section, the new status is used to trigger event actions, reporting, etc.
- Pin Ticket - Check this box to pin the ticket to the agent responsible for the follow-up. For more information on pinning tickets, see Tickets Overview .
- Follow-up Note - Type any important information or comments regarding the follow-up into this field. Generally, follow-up notes describe actions taken and/or the reason the ticket was scheduled for follow-up.

Finding Tickets Scheduled for Follow-up

When an agent schedules a ticket for follow-up, SmarterTrack automatically moves the ticket to the follow-ups area of the tickets section. To quickly view all tickets scheduled for follow-up, expand Global Tickets or My Tickets in the navigation pane and click Follow-ups . Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status.

Removing a Follow-up from Tickets

To remove a follow-up assigned to a ticket, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Remove Follow-up . The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up. Note: SmarterTrack also removes any follow-ups assigned to a ticket if the ticket status is changed to closed and locked or if the ticket is deleted.

Creating New Tickets

On occasion, an agent may need to create a new ticket on behalf of the customer. For example, if a customer calls on the phone and requests information, the agent may create a ticket that includes the requested information, send it to the customer, and mark the ticket closed. This also ensures that the request is documented.

To create a new ticket, click New in the navigation pane toolbar and then click Ticket . This will open a new ticket window that the agent will use to compose an email to the customer.

Composing a Ticket Message

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

The following fields will appear in the header of the ticket:

• To - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should auto-fill this field. If the ticket will be sent to multiple people, separate email addresses with a semi-colon.
• Cc - The email address of any individuals that should receive a copy of the ticket response. If the ticket will be copied to multiple people, separate email addresses with a semi-colon.
• Bcc - The email address of any individuals that should receive a blind carbon copy of the ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semi-colon.
• Subject - The subject of the message. If the agent is replying to a ticket, SmarterTrack should auto-fill this field.
• Attachments - To add an attachment to the ticket response, click Choose File , select the appropriate file, and click Open . Then click Upload to attach the file to the message.

Type the text of the ticket response in the large editing box below the ticket header. Agents can change the formatting using the WYSIWYG editor. For information about setting the default font type and font size, see Preferences .

The following options are available in the toolbar of the ticket response window:

• Send - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; Send and Schedule Follow-up; or Send and Transfer. For more information about the different options, see Tickets Overview .

- Add - Adds a comment, task, file, time log, call log or other related item to the ticket. For more information about the different options, see Viewing Tickets .
- Actions - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.

- Status - To pin or unpin a ticket, select the appropriate option. For information on the different status types, see Tickets Overview .
- Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .
- Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.
- View User Details - Allows the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.
- Get Assistance - Allows the agent to chat with another agent, supervisor, or system administrator that is logged into SmarterTrack.
- Print - Prints the information contained in the communication, custom fields, and details tabs of the ticket.

Tickets in Queue

On occasion, tickets are directed to the queue instead of an agent. Generally, there are two reasons why this occurs:

- In order for a ticket to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets for the corresponding group. If all agents either are logged out or are not receiving tickets, the ticket will be directed to the queue.
- System administrators have the ability to set ticket limits for agents. If that limit is reached, new tickets will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the system administrator may set SmarterTrack to limit agents to five active tickets. Once an agent's active ticket load falls below five, the system will assign additional tickets based on the chosen distribution method.

For information about how SmarterTrack assigns tickets from the queue, see Ticket Distribution Methods .

Deleting Tickets

SmarterTrack has two different methods for deleting tickets. You can simply delete a ticket that is no longer needed or you can mark an unwanted ticket as spam. Note: The ability to delete a ticket is determined by the role permissions. By default, agents cannot delete tickets. For more information, see Roles .

To delete a ticket, simply select the desired ticket(s) in the content pane. Then click the Delete menu in the content pane toolbar and click Delete . Alternatively, agents can delete a ticket they are currently viewing by clicking the Actions menu in the preview pane toolbar, selecting Delete and clicking Delete .

When a ticket is deleted, it will be moved to the Deleted Items area of the tickets section. To view deleted tickets, click Deleted Items in the navigation pane. A list of deleted tickets will load in the content pane. For information on any of the available options, see Tickets Overview .

Marking a Ticket as Spam

Want to mark a ticket as spam instead? Simple select the desired ticket(s) in the content pane. Then click the Delete menu in the content pane toolbar and click Spam . Alternatively, agents can delete a ticket they are currently viewing by clicking the Actions menu in the preview pane toolbar, selecting Delete and clicking Spam .

When a ticket is marked as spam, it will be moved to the Spam area of the tickets section. To view spam tickets, click Spam in the navigation pane. A list of spam tickets will load in the content pane. For information on any of the available options, see Tickets Overview .

Undeleting Tickets

Didn't mean to delete a ticket? Agents can retrieve deleted tickets from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired ticket(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the tickets in Deleted Items at any time without warning, so don't delete tickets if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted tickets.

Agents can also retrieve spam tickets by clicking Spam in the navigation pane and selecting the desired ticket(s). Then click the Delete menu in the content pane toolbar and click Undelete . The tickets will automatically return to the status they had prior to being marked as spam. Note: Your system administrator can permanently remove the tickets in Spam at any time without warning, so don't mark tickets as spam if you might want them later. After the system purges any items marked for deletion, you can't retrieve the spam tickets.

Searching Tickets

As time passes, finding a specific ticket can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tickets quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the the messages within the area of the tickets section you are viewing (i.e. active, waiting, closed, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a ticket. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

General Criteria

The following fields are available:

- Ticket Number - To search by ticket number, enter the ticket number in this field.
- Search String - Type the specific keywords to be queried. The body, subject, and notes sections of tickets will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Subject - To search by ticket subject, type the subject in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Department - To search by department, select the appropriate department from the list.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by ticket status, select the appropriate status from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Custom Fields

The system administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your system administrator.

Spool

All incoming and outgoing SmarterTrack messages are processed through the spool. If your email server is down, messages in the spool will retry at regular intervals until it comes back up.

System administrators can manage incoming and outgoing messages in the spool, retry failed messages, delete failed messages, or view the raw content of any message. To manage the spool, click the tickets icon . Then expand Spool in the navigation pane and select Outgoing (for sent messages) or Incoming (for received messages).

The following options are available from the content pane toolbar:

- Retry - Retries a failed message.
- View - Allows the system administrator to view the raw content of the selected message.
- Delete - Permanently deletes the message(s) from the system.
- Refresh - Refreshes the content pane.

Live Chat

Live Chat Overview

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, capture information on website visitors, and assist more customers concurrently. Customers can initiate live chats via the portal or directly from your website. As agents receive live chat requests, SmarterTrack suggests solutions from relevant knowledge base articles and ticket resolutions, thereby reducing research time and improving overall response times. To access your live chats, click the live chat icon . Depending on the role you are assigned, My Live Chats or Global Live Chats will load.

For help understanding the different areas of the live chat section, see the live chat diagram.

Navigating Your Live Chats

The My Live Chats section organizes all of the live chats for which an agent is responsible. When an agent accesses My Live Chats by clicking My Live Chats in the navigation pane, all active live chats for the agent will load in the content pane.

System administrators and managers may want to view all of the tickets in the SmarterTrack system to evaluate the actual live chat needs of the organization or to gain valuable insight into company operations. To view all live chats in SmarterTrack, click Global Live Chats in the navigation pane. All active live chats in the system will load in the content pane.

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple chats. Live chats must be selected before choosing an action from any toolbar.
- Customer Name - The name the customer would like to be called during the chat.
- Department - The department to which the live chat was assigned.
- Agent - The name of the agent assigned to the chat.
- Status - The current status of the live chat.
- Messages - The number of messages within the chat.
- Duration - The amount of time the chat lasted.
- Idle - The amount of time that passed since an agent sent a message within the chat. Note: Idle time does not reset when a customer sends a message.
- City, Region, Country - The customer's geographic information. Note: Geographic information is not always available.
- Language - The primary language of the customer as indicated from the customer's Web browser.
- Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.
- OS - The operating system of the customer's computer. Note: OS information is not always available.

- Chat Number - A unique number assigned to the chat upon initiation that identifies the chat in the system.
- IP Address - The IP address from which the customer is chatting.
- Name - The name the customer would like to be called during the chat.
- Email - The email address of the individual that submitted the Ticket.
- Department - The department to which the Ticket was assigned.
- Messages - The number of messages within the chat.
- Started - The date and time the chat was initiated. (This column only displays when viewing inactive chats.)
- Duration - The amount of time the chat lasted.
- Idle - The amount of time that passed since an agent sent a message within the chat. Note: Idle time does not reset when a customer sends a message.
- City, Region, Country - The customer's geographic information. Note: Geographic information is not always available.
- Language - The primary language of the customer as indicated from the customer's Web

browser.

• Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.

• OS - The operating system of the customer's computer. Note: OS information is not always available. --%>

Performing Live Chat Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

• Actions - Click this button and select the appropriate option to transfer tickets, mark tickets for follow-up or change the status or priority of tickets.

• Transfer - Transfers the selected chat(s) to another group or agent. For more information on transferring a live chat, see Transferring Live Chats .

• Get From Queue - Pulls a chat from the queue and assign it to the agent. Chats are pulled from the queue based on the amount of time that has passed since the chat was initiated, with those chats with the longest wait times assigned first. This option works best when the system administrator has set cherry picking as the distribution method. For more information see Live Chats in Queue .

• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a live chat in the content pane.

• Refresh - Refreshes the page.

• Visible Fields - Choose which columns are displayed in the navigation pane.

Active Live Chat Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. System administrators can view and edit the status of agents within each group from the Active Live Chat Groups area of the live chats section of the management interface.

The Active Live Chats Groups page gives system administrators and managers the ability to view the following information:

- A list of all agents
- The status of each agent
- The number of active live chats assigned to each agent
- The number of active live chat groups
- The total number of live chat groups that the agent belongs to

To access this information, click the live chat icon , then click Active Live Chat Groups in the navigation pane.

To change the status of an agent, select the agent and click Edit in the content pane toolbar or double-click a specific agent. For more information on agent status, see Agent Status .

Viewing Live Chat

To view a live chat, simply click the desired chat and it will display in the preview pane. If you would rather view the chat in a popup window, double-click the chat instead. Note: Agents can also configure SmarterTrack so that new chats automatically open in a popup window when they are received. For more information, see Preferences .

In general, the following options are available from the preview pane toolbar:

- End Live Chat - Ends the live chat session.
- Transfer - Transfer the live chat to another group or agent.
- Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the live chat.

- Comment - Adds a note or a resolution to the live chat. When an agent adds a resolution to a chat, this information is stored in a searchable database that can be used to quickly and efficiently resolve a live chat issue.
- Task - Attaches a new task to the live chat. When an agent adds a task to a chat, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- Time Log - Attaches a new time log to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Ticket - Attaches a new ticket to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Existing Item - Adds an existing ticket to the chat. When an agent adds an existing item to a

live chat, this information is stored in the Related Items tab.

• Get Assistance - Allows the agent to chat with another agent, supervisor, or system administrator that is logged in to SmarterTrack.

• User Details - Allow the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.

• Print - Allows the agent to print the information contained in the chat, custom fields, and details tabs of the live chat.

Tabs within the Live Chat

Live chat information is organized within the following tabs:

• Chat - This displays the text of the live chat.

• Details - This tab gives the agent a general overview of the chat and summarizes any actions associated to the chat.

• Custom Fields - This tab includes any custom fields the system administrator created to help customize your company's chats. This information can be populated by a user, an agent, or a third-party application (via the system administrator).

• Comments - This tab displays any comments associated with the chat.

• Related Items - This tab lists any tickets, time logs, tasks or files attached to the ticket.

• Resources - This tab displays possible resolutions or relevant knowledge base articles to the live chat issue. Agents can use search terms to find the resolution or knowledge base article that best relates to the chat.

• Map - If enabled in General Settings, this tab displays the geographic location of the customer.

Viewing Live Chats by Status

Generally, live chats are organized into different sections depending on whether they are active or inactive. To view live chats by status, click the live chat icon , expand Global Live Chats or My Live Chats in the navigation pane and select the desired status. All live chats with the selected status will load in the content pane.

Viewing Live Chats by Brand

To view live chats by brand, click the live chat icon and click the appropriate brand in the navigation pane. All active live chats for the selected brand will load in the content pane. Agents can also expand the brand and select the type of live chats they want to view (options include active and inactive chats). Expanding the brand also allows agents to view chats by department or group. Note: Agents can only view the live chats for which they are responsible.

Viewing Live Chats By Agent

To view live chats by agent, click the live chat icon , expand By Agent and click the appropriate agent in the navigation pane. All active chats for the selected agent will load in the content pane. System administrators can also expand the agent and select the type of live chats they want to view (options include active and inactive chats). Note: The ability to view live chats by agent is only available to system administrators and managers.

Viewing Deleted Live Chats

To view deleted live chats, click the live chat icon and click Deleted Items in the navigation pane. All deleted live chats will load in the content pane. For more information on deleted chats, see Deleting Live Chats .

Transferring Live Chats

On occasion, an agent may need to transfer a live chat to another agent or group. There are various reasons why a chat may be transferred. For example, a level 1 tech support agent may need to escalate the chat to a more experienced level 2 agent for resolution. As another example, an incorrectly categorized live chat, such as a support chat that was incorrectly submitted as a sales chat, may need to be rerouted to the correct department. Note: The ability to transfer live chats is determined by the role permissions. By default, agents can transfer live chats. For more information, see Roles .

To transfer a live chat, select the live chat and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the live chat in the preview pane. This will open a pop-up window with the following fields:

- New Group - Select the group to which the chat should transfer from the list.
- New Agent - Select the agent to which the chat should transfer from the list. If the chat does not need to transfer to a specific agent, choose the auto-assign option and the chat will be assigned to an agent within the specified group based on the distribution method set by the system administrator.
- Transfer Note - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the live chat was transferred.

Click OK to transfer the live chat. Note: When a live chat is transferred, idle time is not reset for the new agent.

Live Chats in Queue

On occasion, live Chats are directed to the queue instead of an agent. Generally, there are two reasons why this occurs:

• In order for a live chat to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive chats for the corresponding group. If all agents either are logged out or are not receiving chats, the chat will be directed to the queue. Note: If all agents stop receiving chats at logout, the live chat icon on your site will indicate that chat is unavailable. This will prevent chats from filling the queue during non-business hours.
• System administrators have the ability to set live chat limits for agents. If that limit is reached, new live chats will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the system administrator may set SmarterTrack to limit agents to five active chats. Once an agent's active chats load falls below five, the system will assign additional live chats based on the chosen distribution method.

For information about how SmarterTicket assigns live chats from the queue, see Live Chat Distribution Methods .

Deleting Live Chats

On occasion, an agent or system administrator may need to delete a live chat from the system. Note: The ability to delete a live chat is determined by the role permissions. By default, agents cannot delete live chats. For more information, see Roles .

To delete a live chat, simply select the desired live chat(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an inactive chat they are currently viewing by clicking Delete in the preview pane toolbar.

When a live chat is deleted, it will be moved to the Deleted Items area of the live chat section. To view deleted chats, click Deleted Items in the navigation pane. A list of deleted live chats will load in the content pane. For information on any of the available options, see Live Chat Overview .

Undeleting Live Chats

Didn't mean to delete a live chat? Agents can retrieve deleted live chats from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired live chat(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the live chats in Deleted Items at any time without warning, so don't delete chats if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted live chats.

Searching Live Chats

As time passes, finding a specific live chat can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find chats quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search within the area of the live chat section you are viewing (i.e. active, inactive etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a live chat. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

General Criteria

The following fields are available:

- Chat Number - To search by chat number, enter the chat number in this field.
- Search String - Type the specific keywords to be queried. All sections of the chats will be searched for these keywords.
- Customer Name - To search by customer, enter the customer's name in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Department - To search by department, select the appropriate department from the list.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by chat status, select the appropriate status from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range.

Custom Fields

The system administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your system administrator.

Instant Messenger Overview

SmarterTrack's instant messaging feature promotes collaboration by allowing an agent to seek guidance from another, more experienced agent via instant messenger (IM). This feature is useful when an agent needs clarification or help resolving a customer issue, but does not need to transfer the chat to another agent or supervisor.

Navigating Your Instant Messages

Agents and system administrators can access the instant messenger by clicking the live chats icon and then clicking Instant Messenger in the navigation pane. A list of active IMs will load in the content pane.

In general, the following columns are available to the agent:

- Checkbox - Use these boxes to select multiple IMs. Instant messages must be selected before choosing an action from the toolbar.
- Name - The name of the chat communication type.
- Status - The status of the instant message.
- Started By - The agent that initated the instant message.
- Participants - The number of agents currently participating in the IM.
- Date created - The date and time the IM was initiated.
- Date ended - The date and time the IM ended. (This column only displays when viewing inactive IMs.)

Performing Instant Message Actions

In general, the following options are available in the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following actions are available from the content pane toolbar:

- New - Starts a new IM.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about an IM in the content pane.

- Refresh - Refreshes the page.

• Visible Fields - Choose which columns are displayed in the navigation pane.
• Join - Allows the agent to join an IM already in progress.

Viewing Instant Messenger Conversations

To view an IM, simply click a IM and it will display in the preview pane. If you would rather view the IM in a popup window, click the View button instead. Note: Double-clicking an active IM will add the agent as a participant.

In general, the following options are available in the preview toolbar:

• Join - Allows the agent to join an IM already in progress. (This button only displays when viewing active IMs.)
• Transcript - Opens a text transcript of the entire IM conversation in a popup window.

Tabs within the Instant Messenger Conversation

IM information is organizaed within the following tabs:

• Conversation - This tab displays the last 100 messages in the IM.
• Active Agents - This tab displays information about the agents participating in the IM.
• Online Agents - This tab displays information about agents that are logged into the SmarterTrack system and able to receive an invitation to participate in the IM already in progress.

Note: Inactive IMs display the conversation tab only.

Viewing IMs by Status

Generally, IMs are organized into different sections depending on whether they are active or inactive. To view IM conversations by status, click the live chat icon , expand Instant Messenger in the navigation pane and select the desired status. All IM conversations with the selected status will load in the content pane.

Viewing IMs by Agent

To view IMs by agent, click the live chat icon , expand Instant Messenger in the navigation pane and select the desired agent. All IM conversations for the selected agent will load in the content pane.

Viewing Deleted IMs

To view deleted IMs, click the live chat icon , expand Instant Messenger and click Deleted Items in the navigation pane. All deleted IMs will load in the content pane. For more information on deleted chats, see Deleting Live Chats.

Joining Instant Messenger Conversations

Agents can create a new instant messsage conversation by clicking New in the content pane toolbar. This will open a new IM window with the following fields:

- Agent - Select an agent to IM from the list.
- Message - The text of the initial message you want to send.

To start the IM, click Send .

Agents can also join any active IM to which they have been invited, even if they previously ignored or rejected the IM. To join an IM already in progress, select the IM and click the Join button in the content pane toolbar or preview pane toolbar. This will open the IM in a pop-up window.

Deleting Instant Messenger Conversations

On occasion, an agent or system administrator may need to delete an instant messenger conversation from the system. Note: Only inactive IMs can be deleted.

To delete a IM conversation, simply select the desired IM conversation(s) in the content pane. Then click Delete in the content pane toolbar.

When a IM conversation is deleted, it will be moved to the Deleted Items area of the Instant Messenger section. To view deleted chats, click Deleted Items in the navigation pane. A list of deleted IM conversations will load in the content pane. For information on any of the available options, see Instant Messenger Overview .

Undeleting Instant Messenger Conversations

Didn't mean to delete a IM conversation? Agents can retrieve deleted IM conversations from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired IM conversation(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the IM conversations in Deleted Items at any time without warning, so don't delete chats if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted IM conversations.

Chat Rooms

While temporary agent conversations are hosted via instant messenger, some companies may want to conduct virtual meetings with employees. In this case, the system administrator may create permanent chat rooms to host agent conversations.

To view a list of permanent chat rooms, click the live chat icon . Then expand Chat Rooms in the navigation pane and select the type of chat room that you want to view (options include active and inactive chat rooms).

Chat rooms function identically to instant messages. For more information, see Instant Messenger Overview .

To view an active or inactive chat room, click the Workspace button in the main toolbar and click the Chat Rooms control bar. Then click Active in the left tree view to view active chat rooms or click Inactive in the left tree view to inactive chat rooms. Depending on which item is selected, a listing of all active or inactive chat rooms for which the agent has access will load in the content pane.

The following options are available from the content toolbar:

- Join - Allows the agent to join the chat room.
- Search - Allows the agent to search for a chat room.
- Refresh - Depending on the system settings, the Workspace may or may not automatically refresh itself at regular intervals. Clicking this button will force the Workspace to refresh.

By Chat Room

Agents can join a chat room by expanding By Chat Room in the left tree view and selecting the appropriate chat room. --%>

Call Logs

Call Logs Overview

SmarterTrack's call logging feature provides agents with the ability to track customer service and sales calls. By requiring agents to track their phone conversations, companies can help to eliminate calls from falling through the cracks and reduce the number of unresolved customer issues. In addition, managers can use call logs and their associated reports to determine the number of calls answered or placed per agent or group over a period of time, to determine how much of an agent's workload is dedicated to calls, or to identify common phone complaints and their resolutions.

To access your call logs, click the call logs icon . Depending on the role you are assigned, My Call Logs or Global Call Logs will load.

For help understanding the different areas of the call logs section, see the call logs diagram.

Navigating Your Call Logs

The My Call Logs area organizes all of the calls for which an agent is responsible. When an agent accesses My Call Logs by clicking My Call Logs in the navigation pane, the calls for which the agent is responsible will load in the content pane.

System administrators and managers may want to view all of the call logs in the SmarterTrack system to evaluate the actual phone needs of the organization or to gain valuable insight into company operations. To view all call logs in SmarterTrack, click Global Call Logs in the navigation pane. All call logs in the system will load in the content pane.

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple call logs. Call logs must be selected before choosing an action from any toolbar.
- Subject - An agent-generated phrase that usually describes the call log. Very long subject phrases are truncated.
- Phone Number - The phone number of the caller.
- Department - The group that is assigned to this call log.
- Start Date - The date and time the call started.
- End Date - The date and time the call ended.
- Duration - The length of the call.

Performing Call Log Actions

In general, the following actions are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

- New - Creates a new call log.
- Actions - Click this button and select the appropriate option to transfer a call log or select all call logs.

- Select All - Selects all call logs.
- Transfer - Transfer the selected call log(s) to another group or agent. For more information, see Transferring Call Logs .
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a call log in the content pane.

• Refresh - Refreshes the page.
• Visible Fields - Choose which columns are displayed in the content pane.
• Delete - Deletes the selected call log(s). For more information on deleted call logs, see Deleting Call Logs .

Creating New Call Log

To create a new call log, click New in the navigation pane toolbar and then click Call Log . This will open a new call log window that the agent will use to create the call log.

The new call log window contains all of the call log information (custom fields, related items, and resources), plus the compose tab, which the agent will use to create the call log.

The following fields will appear in the header of the call log:

• Subject - The title of the call log.
• Phone - The phone number of the customer.
• Name - The name of the customer.
• Duration - The date and time the call started and ended.
• Group - The group the call log should be assigned to.
• Agent - The agent the call log should be assigned to.
• Incoming Call - Check this box to indicate that the call was an incoming call.

The following options are available in the toolbar of the new call log window:

• Save - Saves the contents of the call log.
• Add - Allows the agent to attach a new task, time log or existing item to the call log. For more information on these options, see Viewing Call Logs .
• User Details - Allows the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.
• Print - Prints the information contained in the compose tab of the call log.

Viewing Call Logs

To view a call log, simply click a call log and it will display in the preview pane. If you would rather view the call log in a popup window, double-click the call log instead.

In general, the following options are available from the preview pane toolbar:

• Edit - Allows the agent to modify the selected call log.

• Add - Click this button and select the appropriate option to add a new task or time log to the call log or to add an existing item to the call log.

• Task - Attaches a new task to the call log. When an agent adds a task to a call log, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
• Time Log - Attaches a new time log to the call log. When an agent adds a time log to a call log, this information is stored in the Related Items tab.
• Existing Item - Adds an existing ticket to the call log. When an agent adds an existing item to a call log, this information is stored in the Related Items tab.
• User Details - Allows the agent to view a list of tickets, live chats, and call logs associated to the user. Additional information, including the user's username, time zone, and last login date, is also available via the user details.
• Delete - Deletes the call log. For more information on deleted call logs, see Deleting Call Logs

• Print - Allows the agent to print the information contained in the description and details tabs of the task.

Tabs within a Call Log

Call log information is organized within the following tabs:

• Description - This tab includes any description or notes regarding the call.
• Custom Fields - This tab includes any custom fields the system administrator created to help customize your company's call logs. This information can be populated by a user, an agent, or a third-party application (via the system administrator).
• Details - This tab gives the agent a general overview of the call and summarizes any actions associated to the call.
• Related Items - This tab lists any related tasks, time logs or tickets that are attached to the current call log.
• Resources - This tab displays relevant knowledge base articles to the call log issue. Agents can use search terms to find the KB article that best relates to the call log.

Transferring Call Logs

On occasion, an agent may need to transfer a call log to another agent or group. For example, if a call is transferred between agents, the log will also need to be transferred so the new agent can add notes and other information. Note: The ability to transfer call logs is determined by the role permissions. By default, agents can transfer call logs. For more information, see Roles .

To transfer a call log, select the call log and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the call log in the preview pane. This will open a popup window with the following fields:

- New Group - Select the group to which the call log should transfer from the list.
- New Agent - Select the agent to which the call log should transfer from the list.

Click OK to transfer the call log.

Deleting Call Logs

On occasion, an agent or system administrator may need to delete a call log from the system. Note: The ability to delete a call log is determined by the role permissions. By default, agents cannot delete call log. For more information, see Roles .

To delete a call log, simply select the desired live chat(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a call log they are currently viewing by clicking Delete in the preview pane toolbar.

When a call log is deleted, it will be moved to the Deleted Items area of the live chat section. To view deleted chats, click Deleted Items in the navigation pane. A list of deleted call logs will load in the content pane. For information on any of the available options, see Call Logs Overview .

Undeleting Call Logs

Didn't mean to delete a call log? Agents can retrieve deleted live chats from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired call log(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the call logs in Deleted Items at any time without warning, so don't delete call logs if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted call logs.

Searching Call Logs

As time passes, finding a specific call log can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find call logs quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the call log section you are viewing (i.e. all items, deleted items, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

General Criteria

The following fields are available:

- Call Log Number To search by call log number, type the call log number in this field.
- Search String - Type the specific keywords to be queried. The subject and description sections of call logs will be searched for these keywords.
- Subject - To search by subject, type the subject in this field.
- Phone Number - To search by phone number, type the phone number in this field.
- Email Address - To search by email, type the email address in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and due dates in these fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the date the task was last edited, enter the modified date in the fields or click the calendars and select the appropriate dates.
- Department - To search by department, select the appropriate department from the list.
- Agent - To search by agent, select the appropriate agent from the list.
- Sort Results - To specify the order in which results are displayed, select the appropriate option from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Custom Fields

The system administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your system administrator.

Tasks

Tasks Overview

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to add related tickets, live chats, and call logs to any task in the system. This ability ensures agents can have all the information necessary to complete a task in one convenient location.

To access your tasks, click the tasks icon . Depending on the role you are assigned, My Tasks or Global Tasks will load.

For help understanding the different areas of the tasks section, see the tasks diagram .

Navigating Your Tasks

The My Tasks section organizes all of the tasks for which an agent is responsible. When an agent accesses My Tasks by clicking My Tasks in the navigation pane, all active tasks for the agent will load in the content pane.

On occasion, system administrators and managers may want to view all of the tasks in the SmarterTrack system. To view all tasks in SmarterTrack, click Global Tasks in the navigation pane. All active tasks in the system will load in the content pane.

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple tasks. Tasks must be selected before choosing an action from the toolbar.
- Subject - An agent-generated phrase that usually describes the task. Very long subject phrases are truncated.
- Owner - The agent assigned to the task.
- Start Date - The date and time the agent should begin the task.
- Due Date - The date and time the agent should complete the task by.

Performing Task Actions

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following actions are available from the content pane toolbar:

- New - Creates a new task.
- Actions - Click this button and select the appropriate option to transfer tasks, select all tasks, or to change the status or priority of tasks.

- Select All - Selects all of the tasks in the content pane.
- Transfer - Transfers the selected task(s) to another group or agent. For more information, see Transferring Tasks .
- Status - To change the status of a task, select the appropriate option from the list.

- Active - Marks the selected task(s) as active. Generally, a task would be marked active when an agent is working on it.
- Closed - Marks the selected task(s) as closed. Generally, a task is marked as closed when the agent has completed the task.
- Priority - To change the priority level of a task, select the appropriate option from the list.

- Urgent - The selected tasks are very important and will show at the top of the lists.
- High - The selected tasks are a high priority and will be sorted toward the top of the lists.
- Normal - The selected tasks have a normal or unspecified priority level.
- Low - The selected tasks have a low priority and will be sorted toward the bottom of the lists.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.

- Refresh - Refreshes the page.
- Visible Fields - Choose which columns are displayed in the navigation pane.
- Delete - Deletes the selected task(s). When a task is deleted, it will be moved to the Deleted Items section of the navigation pane. For more information, see Deleting Tasks .

Creating New Tasks

To create a new task, click New in the navigation pane toolbar and then click Task . This will open a new task window that the agent will use to create the task.

The following fields will appear in the new task window:

- Subject - The title of the task.
- Agent - The agent the task should be assigned to.
- Start Date - The date and time the agent should start the task.
- Due Date - The date and time the agent should complete the task by.
- Status - Select the status of the task. Generally, an agent will want to mark a new task as

active.

- Priority - Select the priority level of the task. By default, tasks are set to normal priority.
- Reminder - Select when to receive a reminder about an upcoming task. For example, if the agent selects 10 minutes, a reminder will pop up 10 minutes before the task is due.
- Related Item - If the task is associated to a specific ticket, live chat, or call log, type the item number in this field.
- Description - Type any description or notes regarding the task.

Click Save to create the task.

Viewing Tasks

To view a task, simply click a task and it will display in the preview pane. If you would rather view the task in a popup window, double-click the task instead. Note: Double-clicking a task assigned to you also enables you to edit the task.

In general, the following options are available from the preview pane toolbar:

- Edit - Allows the agent to modify the task.
- Print - Allows the agent to print the information in the task.

Tabs within a Task

Task information is organized within the following tabs:

- Description - This tab includes any description or notes regarding the task.
- Details - This tab includes all information pertaining to the task, including start date, end date, creation date, reminders, related items, status, and priority level of the task. Any modifications to the task are also recorded in this tab.

Note: When viewing the task in the preview pane, the task information may be displayed differently.

Viewing Tasks by Status

Generally, tasks are organized into different sections depending on whether they are active, upcoming or closed. To view tasks by status, click the task icon , expand Global Tasks or My Tasks in the navigation pane and select the desired status. All tasks with the selected status will load in the content pane.

Viewing Deleted Tasks

To view deleted tasks, click the tasks icon and click Deleted Items in the navigation pane. All deleted tasks will load in the content pane. For more information, see Deleting Tasks .

Transferring Tasks

On occasion, an agent may need to transfer a task to another agent or group. There are various reasons why a task may be transferred. For example, an agent that is leaving for vacation may need to transfer tasks to another agent to ensure they are completed while he is out of the office. As an another example, if an agent finds his workload is too heavy, he may transfer a task to another agent to rebalance his workload. Note: The ability to transfer tasks is determined by the role permissions. By default, agents can transfer tasks. For more information, see Roles .

To transfer a live chat, select the live chat and click the Actions menu in the content pane toolbar and click Transfer . This will open a pop-up window with the following fields:

- New Agent - Select the agent to which the task should transfer from the list.
- New Status - Select the status of the task. Generally, an agent will want to mark a transferred task as active.
- New Priority - Select the priority level of the task. By default, the priority level is normal.

Click OK to transfer the task.

Deleting Tasks

On occasion, an agent or system administrator may need to delete a task from the system. Note: The ability to delete a task is determined by the role permissions. By default, agents cannot delete tasks. For more information, see Roles .

To delete a task, simply select the desired task(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a task they are currently viewing by clicking Delete in the preview pane toolbar.

When a task is deleted, it will be moved to the Deleted Items area of the task section. To view deleted tasks, click Deleted Items in the navigation pane. A list of deleted tasks will load in the content pane. For information on any of the available options, see Tasks Overview .

Undeleting Tasks

Didn't mean to delete a task? Agents can retrieve deleted tasks from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired task(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the tasks in Deleted Items at any time without warning, so don't delete tasks if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted tasks.

Searching Tasks

As time passes, finding a specific task can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tasks quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the task section you are viewing (i.e. active, upcoming, closed, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

The following fields are available:

- Search String - Type the specific keywords to be queried. The subject and description sections of tasks will be searched for these keywords.
- Related Item - To search by related item, type the number of the associated live chat, ticket, or call log.
- Agent - To search by agent, select the appropriate agent from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Status - To search by task status, select the appropriate status from the list.
- Start Date - To search by the date the task was started, enter the start date in the fields or click the calendars and select the appropriate dates.
- Due Date - To search by the date the task was due, enter the due date in the fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the last modified date, enter the date in the fields or click the calendars and select the appropriate dates.
- Sort Results - To specify the order in which results are displayed, select the appropriate option from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Knowledge Base

Knowledge Base Overview

The knowledge base is a tool companies can use to share information with employees, customers, and partners. In its simplest form, SmarterTrack's knowledge base is an online repository of articles that helps agents and customers solve issues quickly and efficiently. A well-organized knowledge base can save organizations money by decreasing the amount of employee time spent trying to find information about company products, policies, and/or procedures. As a customer service tool, a knowledge base can give customers easy access to information that would otherwise require contact with the company's staff.

To access the knowledge base, click the knowledge base icon . All of the knowledge base articles for the default brand will load in the content pane.

For help understanding the different areas of the knowledge base section, see the knowledge base diagram .

Navigating the Knowledge Base

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple articles. Articles must be selected before choosing an action from the toolbar.
- Article Title - The title of the article.
- Status - The status of the article (private, public, draft, etc.).

Performing Knowledge Base Actions

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.
- Actions - Click this button and select the appropriate option to add, edit or delete folders to the knowledge base.

- Add Folder - Creates a new knowledge base folder.
- Edit Folder - Modifies an existing knowledge base folder.
- Delete Folder - Deletes an existing knowledge base folder and all of its contents.

In general, the following options are available from the content pane toolbar:

• New - Creates a new knowledge base article in the selected folder.
• Actions - Click this button and select the appropriate option to select all articles, move articles, copy articles or change the status of articles.

• Select All - Selects all knowledge base articles in the content pane.
• Mark - Click this button and select the appropriate option to change the status of the selected article(s).

• Public - Marks the article as public. Public articles are visible to everyone.
• Private - Marks the article as private. Private articles are only visible to system administrators and agents.
• Draft - Marks the article as a draft. Drafts are only visible to system administrators and agents.

• Reviewed - Marks the article as reviewed. Agents typically use this option to indicate that an article has been reviewed/modified after another agent has flagged it for review or the article has become stale. Note: By default, articles become stale every 90 days. This is to ensure content is reviewed for accuracy on a regular basis.
• Needs Review - Flags the article for review. Agents typically flag an article for review when they want the article edited for content, clarity, or grammatical errors.
• Move - Moves the selected article(s) to another folder.
• Copy - Copies the selected article(s) to another folder.
• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed in the content pane.

• Refresh - Refreshes the page.
• Visible Fields - Choose which columns are displayed in the content pane.
• Delete - Deletes the selected knowledge base articles. For more information, see Deleting Knowledge Base Articles .

Creating New Knowlege Base Articles

To create a new knowledge base article, click New in the navigation pane toolbar and then click Knowledge Base Article This will open a new article window that the agent will use to create the article.

The new article window contains tabs for options, details and translations, plus the compose tab, which the agent will use to write the article.

The following fields will appear in the header of the new article window:

- Title - Type the title of the article in this field.
- Folder - To specify the folder in which this article should appear, select the appropriate folder from the list.
- Summary - Type a brief summary of the article in this field.
- Status - To specify the status of the article, select the appropriate checkbox(es). For more information, see Knowledge Base Overview

Type the text of the article in the large editing box below the article header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the options tab of the new article window:

- Language - To specify the language, select the appropriate language from the list.
- Brands - To specify which brands the knowledge base article applies to, select the appropriate checkboxes.
- Keywords - To specify related keywords that are not included in the content of the article, type the keywords in this field. Specifying related keywords can increase the accuracy of search results. Note: Keywords do not have to be separated with any type of punctuation.

The following options are available in the toolbar of the new article window:

- Save - Saves the contents of the article.
- Link Item - Links a translation of the article to the current article. Note: This option is only visible when viewing the translations tab.
- Unlink Item - Unlinks the selected translation(s) of the article from the current article. Note: This option is only visible when viewing the translations tab.

Viewing Knowledge Base Articles

To view a knowledge base article, simply click an article and it will display in the preview pane. If you would rather view the article in a popup window, double-click the article instead. Note: Double-clicking an article also enables you to edit the article.

In general, the following options are available from the preview pane toolbar:

- View in Portal - Loads the selected knowledge base article in the portal. Viewing the article in the portal allows agents to see the layout of the article as portal visitors will see it.
- Edit - Edits the selected article.
- Delete - Deletes the selected article. For more information, see Deleting Knowledge Base Articles .

Tabs within an Article

Article information is organized within the following tabs:

• Content - The text of the knowledge base article.
• Details - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.
• Translations - The linked translations of the article.

Viewing Articles by Status

Occasionally, agents and system administrators may want to view all articles that are marked as drafts or that need reviewed. To view articles by status, click the knowledge base icon , expand By Status in the navigation pane and select the desired status. All articles with the selected status will load in the content pane.

Viewing Articles by Brand

To view articles by brand, click the knowledge base icon , expand By Brand in the navigation pane and select the desired brand. All articles assigned to the selected brand will load in the content pane.

Viewing Deleted Articles

To view deleted articles, click the knowledge base icon and click Deleted Items in the navigation pane. All deleted articles will load in the content pane. For more information, see Deleting Knowledge Base Articles .

Deleting Knowledge Base Articles

On occasion, an agent or system administrator may need to delete a knowledge base article from the system. Note: The ability to delete a knowledge base article is determined by the role permissions. By default, agents cannot delete knowledge base articles. For more information, see Roles .

To delete a knowledge base article, simply select the desired article(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an article they are currently viewing by clicking Delete in the preview pane toolbar.

When an article is deleted, it will be moved to the Deleted Items area of the knowledge base section. To view deleted articles, click Deleted Items in the navigation pane. A list of deleted articles will load in the content pane. For information on any of the available options, see Knowledge Base Overview .

Undeleting Articles

Didn't mean to delete an article? Agents can retrieve deleted articles from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired article(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the articles in Deleted Items at any time without warning, so don't delete articles if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted articles.

Search for Articles

There are two methods an agent can use to search for an article: basic search or advanced search. Both KB search methods support using "+keyword" to only show articles containing that keyword or "-keyword" to exclude articles containing that keyword.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the knowledge base section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the knowledge base icon . Then click Advanced Search in the navigation pane.

The following fields are available:

- Search String - Type the specific keywords to be queried. Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates. --%>
- Folder - To search by folder, select the appropriate folder from the list.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Status - To search by article status (drafts, stale, private, etc.), select the appropriate status from the list.
- Creation Date - To search by article creation date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which articles were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.

• Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
• Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Managing Knowledge Base Folders

Knowledge base articles are stored and organized using folders. For example, a financial institution using the knowledge base as a self-serve resource for customers may organize all of the articles related to savings accounts in one folder and articles related to checking accounts in another folder.

By default, SmarterTrack includes a sample folder containing a sample knowledge base article. The sample folder and article are provided as placeholders and can be deleted or modified at any time.

Creating Knowledge Base Folders

To add a new folder, click the Actions menu in the navigation pane toolbar and click Add Folder This will open a new folder window with the following fields:

• Folder - The name of the new folder.
• Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.
• Mark As Private - Check this box to limit access to the folder and its contents to system administrators and agents only.
• Display folder in portal search menus - Check this box to allow portal visitors to choose this folder from the drop-down list when searching the knowledge base.

Click Save .

Moving Knowledge Base Articles to Another Folder

Moving knowledge base articles between folders in SmarterTrack is easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a knowledge base folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

Canned Replies

Canned Replies Overview

Agents can use canned replies--or predefined responses to frequently asked questions--to quickly and efficiently respond to some tickets and live chats.

To access canned replies, click the canned replies icon . All of the canned replies in the root folder that are assigned to a department you belong to will load in the content pane.

For help understanding the different areas of the canned replies section, see the canned replies diagram.

Navigating Canned Replies

In general, the following columns are available in the content pane:

• Checkbox - Use these boxes to select multiple articles. Canned replies must be selected before choosing an action from the actions toolbar.
• Title - The title of the canned reply.
• Status - The status of the canned reply (private, public, draft, etc.)
• Owner - The agent or department to which the canned reply is assigned. This determines which agents or departments have access to the canned reply.

Performing Canned Reply Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.
• Actions - Click this button and select the appropriate option to add, edit or delete folders to the knowledge base.

• Add Folder - Creates a new canned replies folder.
• Edit Folder - Modifies an existing canned replies folder.
• Delete Folder - Deletes an existing canned replies folder and all of its contents.

In gneral the following options are available from the content pane toolbar:

• New - Creates a new canned reply in the selected folder.
• Actions - Click this button and select the appropriate option to select all canned replies, move canned replies, copy canned replies or change the status of canned replies.

• Select All - Selects all canned replies in the content pane.
• Mark - Click this button and select the appropriate option to change the status of the selected canned reply(s).

• Public - Marks the canned reply as public. Public canned replies are visible system administrators and agents.
• Private - Marks the article as private. Private articles are only visible to system administrators and the agent that created the canned reply.
• Draft - Marks the article as a draft. Drafts are only visible to system administrators and agents.

• Reviewed - Marks the canned reply as reviewed. Agents typically use this option to indicate that a canned reply has been reviewed/modified after another agent has flagged it for review or the canned reply has become stale. Note: By default, canned replies become stale every 90 days. This is to ensure content is reviewed for accuracy on a regular basis.
• Needs Review - Flags the canned reply for review. Agents typically flag a canned reply for review when they want the canned reply edited for content, clarity, or grammatical errors.
• Move - Moves the selected canned reply(s) to another folder.
• Copy - Copies the selected canned reply(s) to another folder.
• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed in the content pane.

• Refresh - Refreshes the page.
• Visible Fields - Choose which columns are displayed in the content pane.
• Delete - Deletes the selected knowledge base articles. For more information, see Deleting Canned Replies .

Creating New Canned Replies

To create a new canned reply, click New in the navigation pane toolbar and then click Canned Reply This will open a new canned reply window that the agent will use to create the canned reply.

The new canned reply window contains tabs for options and details, plus the compose tab, which the agent will use to write the canned reply.

The following fields will appear in the header of the new canned reply window:

• Title - Type the title of the canned reply in this field.
• Folder - To specify the folder in which this canned reply should appear, select the appropriate folder from the list.
• Assign To - To specify the agent or department to which the canned reply should be assigned, select the appropriate option from the list.
• Status - To specify the status of the canned reply, select the appropriate checkbox(es). For more information, see Canned Replies Overview

Type the text of the canned reply in the large editing box below the canned reply header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the options tab of the new article window:

• Language - To specify the language, select the appropriate language from the list.
• Canned Reply Type - To specify whether the canned reply can be used for tickets and live chats, tickets only, or live chats only, select the appropriate option from the list.

The following options are available in the toolbar of the new article window:

• Save - Saves the contents of the canned reply.

Viewing Canned Replies

To view a canned reply, simply click a canned reply and it will display in the preview pane. If you would rather view the canned reply in a popup window, double-click the canned reply instead. Note: Double-clicking a canned reply also enables you to edit the canned reply.

In general, the following options are available from the preview pane toolbar:

• Edit - Edits the selected canned reply.
• Delete - Deletes the selected canned reply. For more information, see Deleting Canned Replies
.

Tabs within a Canned Reply

Canned reply information is organized within the following tabs:

• Content - The text of the knowledge base article.
• Details - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.

Viewing Canned Replies by Status

Occasionally, agents and system administrators may want to view all canned replies that are marked as drafts or that need reviewed. To view canned replies by status, click the canned replies icon , expand By Status in the navigation pane and select the desired status. All canned replies with the selected status will load in the content pane.

Viewing Canned Replies by Brand

To view canned replies by brand, click the canned replies icon , expand By Brand in the navigation pane and select the desired brand. All canned replies assigned to the selected brand will load in the content pane.

Viewing Deleted Canned Replies

To view deleted canned replies, click the canned replies icon and click Deleted Items in the navigation pane. All deleted canned replies will load in the content pane. For more information, see Deleting Canned Replies .

Deleting Canned Replies

On occasion, an agent or system administrator may need to delete a canned reply from the system. Note: The ability to delete a canned reply is determined by the role permissions. By default, agents can delete canned replies. For more information, see Roles .

To delete a canned reply, simply select the desired canned reply(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a canned reply they are currently viewing by clicking Delete in the preview pane toolbar.

When a canned reply is deleted, it will be moved to the Deleted Items area of the canned replies section. To view deleted canned replies, click Deleted Items in the navigation pane. A list of deleted canned replies will load in the content pane. For information on any of the available options, see Canned Replies Overview .

Undeleting Canned Replies

Didn't mean to delete a canned reply? Agents can retrieve deleted canned replies from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired canned reply(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the canned replies in Deleted Items at any time without warning, so don't delete canned replies if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted canned replies.

Search for Canned Replies

There are two methods an agent can use to search for a news item: basic search or advanced search.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the canned replies section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the canned replies icon . Then click Advanced Search in the navigation pane.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by root folder, select the appropriate folder from the list.
- Assigned To - To search by the agent or department to which the canned reply is assigned, select the appropriate option from the list.
- Status - To search by status (drafts, stale, etc.), select the appropriate status from the list.
- Creation Date - To search by the creation date of the canned reply, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which canned replies were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Managing Canned Reply Folders

Canned replies are stored and organized using folders. For example, a company may organize all of the canned replies related to billing in one folder and canned replies related to promotional offers in another folder.

By default, SmarterTrack includes a sample folder containing a sample canned reply. The sample folder and canned reply are provided as placeholders and can be deleted or modified at any time.

Creating Canned Reply Folders

To add a new folder, click the Actions menu in the navigation pane toolbar and click Add Folder This will open a new folder window with the following fields:

• Folder - The name of the new folder.

• Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.

Click Save .

Moving Canned Replies to Another Folder

Moving canned replies between folders in SmarterTrackis easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a canned replies folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

News

News Overview

The news section gives organizations the ability to post important notices to portal visitors, such as company news, current promotions and sales, or information on upcoming events. For example, a realty agency may use news items to highlight new or featured properties or an educational institution may use news items to give parents updates about school policies, parent/teacher conferences, holidays, and other important events.

To access news items, click the news icon . All of the news items in the system will load in the content pane.

For help understanding the different areas of the news section, see the news diagram.

Navigating News

In general, the following columns are available in the content pane:

• Checkbox - Use these boxes to select multiple articles. Articles must be selected before choosing an action from a toolbar.
• Title - The title of the news item.
• Status - The status of the news item (private, public, draft, etc.).

Performing News Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

• New - Creates a new news item.
• Actions - Click this button and select the appropriate option to select all news items change the status of news items.

• Select All - Selects all news items in the content pane.
• Mark - Click this button and select the appropriate option to change the status of the selected news item(s).

• Public - Marks the news item as public. Public news items are visible to everyone.
• Private - Marks the news item as private. Private news items are only visible to system administrators and agents.
• Draft - Marks the news item as a draft. Drafts are only visible to system administrators and agents.
• Reviewed - Marks the news item as reviewed. Agents typically use this option to indicate that a news item has been reviewed/modified after another agent has flagged it for review.
• Needs Review - Flags the news item for review. Agents typically flag a news item for review when they want it edited for content, clarity, or grammatical errors.
• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed in the content pane.

• Refresh - Refreshes the page.

• Visible Fields - Choose which columns are displayed in the content pane.
• Delete - Deletes the selected news items. For more information, see Deleting News Items .

Creating News Items

To create a new news item article, click New in the navigation pane toolbar and then click News Item This will open a new news item window that the agent will use to create the article.

The new news item window contains tabs for options, details and translations, plus the compose tab, which the agent will use to write the article.

The following fields will appear in the header of the news item window:

• Title - Type the title of the news item in this field.
• Date - The date the news item was created.
• Summary - Type a brief summary of the news item in this field.
• Status - To specify the status of the news item, select the appropriate checkbox(es). For more information, see News Overview

Type the text of the news item in the large editing box below the news item header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the options tab of the new article window:

• Language - To specify the language, select the appropriate language from the list.
• Brands - To specify which brands the news item applies to, select the appropriate checkboxes.

The following options are available in the toolbar of the news item window:

• Save - Saves the contents of the news item.
• Link Item - Links a translation of the news item to the current news item. Note: This option is only visible when viewing the translations tab.
• Unlink Item - Unlinks the selected translation(s) of the news item from the current news item. Note: This option is only visible when viewing the translations tab.

Viewing News Items

To view a news item, simply click a news item and it will display in the preview pane. If you would rather view the news item in a popup window, double-click the news item instead. Note: Double-clicking a news item also enables you to edit the news item.

In general, the following options are available from the preview pane toolbar:

- View in Portal - Loads the selected news item in the portal. Viewing the news item in the portal allows agents to see the layout of the news iem as portal visitors will see it.
- Edit - Edits the selected news item.
- Delete - Deletes the selected news item. For more information, see Deleting News Items .

Tabs within a News Item

News item information is organized within the following tabs:

- Content - The text of the news item.
- Details - This tab includes all information pertaining to the news item, including creation date, modified date, and the number of unique views and hits.
- Translations - The linked translations of the news item.

Viewing News Items by Status

Occasionally, agents and system administrators may want to view all news items that are marked as drafts or that need reviewed. To view news items by status, click the news icon , expand By Status in the navigation pane and select the desired status. All news items with the selected status will load in the content pane.

Viewing News Items by Brand

To view news iems by brand, click the news icon , expand By Brand in the navigation pane and select the desired brand. All news items assigned to the selected brand will load in the content pane.

Viewing Deleted News Items

To view deleted news items, click the news icon and click Deleted Items in the navigation pane. All deleted news items will load in the content pane. For more information, see Deleting News Items .

Deleting News Items

On occasion, an agent or system administrator may need to delete a news item from the system. Note: The ability to delete a news item is determined by the role permissions. By default, agents can delete news items. For more information, see Roles .

To delete a news item, simply select the desired news item(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a news item they are currently viewing by clicking Delete in the preview pane toolbar.

When a news item is deleted, it will be moved to the Deleted Items area of the news section. To view deleted canned replies, click Deleted Items in the navigation pane. A list of deleted news items will load in the content pane. For information on any of the available options, see News Overview .

Undeleting News Items

Didn't mean to delete a news item? Agents can retrieve deleted news items from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired news item(s). Then click the Delete menu in the content pane toolbar and click Undelete .
Note: Your system administrator can permanently remove the news items in Deleted Items at any time without warning, so don't delete news items if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted news items.

Searching News Items

There are two methods an agent can use to search for a specific news item: basic search or advanced search.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the news section you are viewing (i.e. a specific brand, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the news icon . Then click Advanced Search in the navigation pane.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Status - To search by status (drafts, flagged, etc.), select the appropriate status from the list.
- Date Range - To search by a date range during which news was published, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Surveys

Surveys Overview

SmarterTrack's survey feature allows companies to solicit customer feedback that will give managers a better perspective into customer satisfaction and loyalty. Obtaining customer feedback in a timely and useable format helps to ensure that the company is meeting and exceeding customer expectations and gives insight into key changes that should be made to improve the overall success of the company.

To access surveys, click the surveys icon . All of the survey results for the default brand will load in the content pane. Note: Only employees with supervisory access can access the surveys section. For more information, see Roles .

For help understanding the different areas of the surveys section, see the surveys diagram.

Navigating Surveys

To see a list of all surveys in the system, click All Surveys in the navigation pane. All surveys will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple surveys. Surveys must be selected before choosing an action from a toolbar.
• Name - The name of the survey.
• Surveys Offered - The number of times the survey has been offered to customers.
• Surveys Answered - The number of times customers completed the survey.

Performing Survey Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

• New - Creates a new survey.
• Actions - Click this button and select the appropriate option to select all surveys.

• Select All - Selects all surveys in the content pane.
• View - Click this button and select the appropriate option to refresh the page.

• Refresh - Refreshes the page.

• Delete - Permanently deletes the selected surveys and any associated survey results.

Navigating Survey Results

• Checkbox - Use these boxes to select multiple survey results. Surveys results must be selected before choosing an action from a toolbar.

• Survey Name - The name of the survey.

• Agent - The agent that offered the survey.

• Answered - The date the customer completed the survey.

• Rating - The overall score that the survey received. The rating is determined based on the weight of each survey question and the customer's response.

Performing Survey Result Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

• New - Creates a new survey.

• Actions - Click this button and select the appropriate option to select all survey results.

• Select All - Selects all survey results in the content pane.

• View - Click this button and select the appropriate option to refresh the page or view a related item.

• Refresh - Refreshes the page.

• Related Item - Allows system administrators to view the ticket or live chat the survey is associated to.

• Delete - Permanently deletes the selected surveys and any associated survey results.

Creating New Surveys

To create a new survey, click the surveys icon and click All Surveys in the navigation pane. Then click New in the content pane toolbar. This will open the survey editor, which the agent will use to create the new survey. For step-by-step instructions on how to create a survey, see the KB article How To - Create a Survey .

Options Tab

This tab allows the agent to specify basic information regarding the survey. The available options are:

- Survey Name - Type the name of the survey in this field.
- Header Text - Type survey instructions or welcome message in this field. The text will appear at the top of the survey.
- Thank You Text - Type a closing message in this field. This customer will see this text after successfully submitting the survey.

Questions Tab

This tab allows agents to create, edit, or modify the order of survey questions. If the agent is editing a survey, a list of the current questions will load in the content pane.

In general, the following columns are available to the agent:

- Checkbox - Use these boxes to select multiple questions. Questions must be selected before choosing an action from the actions toolbar.
- Move - Use these arrows to modify the order of survey questions.
- Question - The question text.
- Question Type - Options include short answer, long answer, single selection, multiple selection, yes/no, and rating.
- Weight - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

The following options are available from the survey editor toolbar:

- Save - Saves the survey.
- Add Question - Adds a new question to the survey.
- Edit - Edits the selected question.
- Delete - Permanently deletes the selected question(s).

Viewing Surveys

To view a survey, simply click a survey and it will display in the preview pane. If you would rather view the survey in a popup window, double-click the survey instead. Note: Double-clicking a survey also enables you to edit the survey.

In general, the following options are available from the preview pane toolbar:

• Edit - Edits the survey contents.
• Delete - Permanently deletes the selected survey and any associated survey results.

Viewing Survey Results

To view a survey result, simply double-click a survey result. The survey questions will load in the content pane and the following columns will be available:

• Question - The text of the survey question.
• Answer - The customer's answer to the survey question.
• Score - The score the agent received on the question. Generally, higher scores indicate better peformance.
• Max Score - The highest possible score the agent could receive on the question.
• Weight - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

In general the following options are available in the content pane toolbar:

• Delete - Permanently deletes the survey answer.

Viewing Survey Results by Brand

To view survey results by brand, click the surveys icon and click appropriate brand in the navigation pane. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in the content pane.

Viewing Survey Results By Agent

To view survey results by agent, click the surveys icon , expand By Agent in the navigation pane and select the desired agent. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in the content pane.

Viewing Survey Results by Survey

To view results by survey, click the surveys icon , expand By Survey in the navigation pane and select the desired survey. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in the content pane.

Who's On

Who's On Overview

SmarterTrack's Who's On feature gives agents the ability to see who is browsing the company portal and/or website. In addition, Who's On provides information about visitors that can be used to expedite customer service, identify trends, and create targeted sales and marketing campaigns.

For help understanding the different areas of the Who's On section, see the Who's On diagram .

Navigating Who's On

The Who's On section provides information about current website and/or portal visitors. When an agent accesses Who's On by clicking the Who's On icon and then clicking the appropriate brand, all visitors currently browsing your website will load in the content pane.

In general, the following columns are always available to the agent:

- Checkbox - Use these boxes to select multiple Wwbsite or portal visitors. Visitors must be selected before choosing an action from the toolbar.
- Status - Indicates whether the visitor is being tracked by Who's On.

- If the status is active, Who's On is tracking the visitor.
- If the status is pending, Who's On will resume tracking the visitor once the visitor navigates to another page of your website or portal.
- If the status indicator is removed, Who's On is not tracking the visitor.
- Started - The date and time the session was initiated.
- Duration - The amount of time the visitor has been on your website or portal.
- Idle - The amount of time that passed since a visitor has navigated to a page within your website or portal.
- City, Region, Country - The customer's geographic information. Note: Geographic information is not always available.

In addition, the following columns can be added or removed by the agent at any time:

- IP Address - The customer's IP address.
- Host Name - The unique name by which the visitor's networked-attached device (computer, cell phone, etc.) is known on a network.
- Host Domain - The name of the server on which the visitor's network is hosted.
- Hits - The number of times a visitor hits any page of your Web site or portal. Note: Only pages that are configured for Who's On tracking will be included in this figure.

• Language - The primary language of the customer as indicated from the customer's Web browser.
• Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.
• OS - The operating system of the customer's computer. Note: OS information is not always available.
• Chat Status - The current chat status of the customer.

• Sent - A chat invitation is pending.
• Active - The customer is participating in a live chat.
• Rejected - The customer rejected the chat invitation or closed the chat window.
• Ignored - The customer ignored the chat invitation or navigated to a different page.
• Initial Page - The URL of the first page of your Web site or portal that the visitor viewed.
• Initial Virtual Page - The first page of your Web site or portal that the visitor viewed as defined by the tracking script set by the system administrator. Virtual pages can be used to summarize the contents of the initial page. For example, if the initial page URL is lengthy, the system administrator may want to create a virtual page with a shorter identifier.
• Initial Page Title - The title of the initial page.
• Initial Referrer - The URL of the Web page the visitor navigated from to reach your Web site or portal.
• Current Page - The current page URL the visitor is browsing.
• Current Page Title - The title of the current page the visitor is browsing.
• Current Referrer - The URL of the Web page the visitor last navigated from.
• Chat Invites Sent - The number of live chat invites the visitor has received.
• Chat Invites Rejected - The number of live chat invites the visitor has rejected.
• Chat Invites Accepted - The number of live chat invites the visitor has accepted.
• Chat Invites Ignored - The number of live chat invites the visitor has ignored.
• Chats Forced - The number of forced live chats with the visitor.
• Invitation Last Sent Date - The date and time the customer last received a live chat invitation.
• Last Chat Date - The date and time the customer last participated in a live chat.
• First Chat Date - The date and time the customer first participated in a live chat.
• Last Agent to Chat - The agent that last corresponded with the customer via live chat.
• Last Department to Chat - The department that last corresponded with the customer via live chat. Note: The information provided in each column pertains to the current session only.

Performing Who's On Actions

In general, the following options are available from the navigation pane toolbar:

• New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

• Actions - Click this button and select the appropriate option to select all visitors or remove a visitor from Who's On.

• Select All - Selects all of the visitors listed in the content pane.
• Invite to Live Chat - Selecting this option will send a live chat invitation to the visitor.
• Force to Live Chat - Selecting this option will open a live chat with the visitor. Note: This option bypasses the invitation stage of the chat process—it does not force the visitor to participate in the chat. The visitor may close the chat box without responding.
• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.

• Refresh - Refreshes the page.
• Visible Fields - Choose which columns are displayed in the navigation pane.

Viewing a Visitor's Who's On Summary

To view additional information about a visitor, simply click a visitor and the visitor's Who's On summary will load in the preview pane. Note: The information provided in the Who's On summary pertains to the current session only.

In general, the following options are available from the preview pane toolbar:

• Print - Prints the information contained in the Who's On summary.

Tabs within the Who's On Summary

Who's On summary details are organized within the following tabs:

• Visitor - This tab includes basic information about the session, including the start time, duration and idle time. This tab also includes information about the visitor, including browser type, operating system, geographic details, the host name, and the host domain.
• Page History - This tab displays the website and portal pages the visitor viewed in chronological order. This tab also includes the time the visitor viewed each page, the length of time the visitor viewed each page, and the number of hits for that page.
• Page Summary - This tab organizes the pages the visitor viewed by the number of times the visitor hit each page. This tab also includes information about the initial page title, the initial referrer, the current referrer, and the total amount of time the visitor spent on each website or

portal page.

• Invitation History - This tab displays information about the visitor's live chat activity in chronological order. Note: If the visitor has not participated in any live chats and has not received any live chat invitations, there will be no content in this tab.

• Invitation Summary - This tab displays information about the visitor's chat activity, including the number of live chat invitations the visitor accepted, rejected, and ignored; the total number of live chat invitations the visitor received; the date and time of the last live chat the visitor participated in; and the last agent to chat with the visitor.

• Custom Variables - This tab displays any custom variables the system administrator created. Map - This tab displays the geographic location of the customer. Note: Agents can initiate a live chat from the map by clicking on a pin and clicking Invite to Chat . --%>

Viewing Removed Visitors

When an agent removes a visitor from Who's On tracking, the session times out or the visitor does not navigate to another page for awhile, SmarterTrack moves the visitor to the Removed Users section of the navigation pane. To view removed users, click the Who's On icon and click Removed Users in the nagivation pane. All removed users will load in the content pane. For more information, see Removing Visitors .

Chatting with Visitors

On occasion, an agent may want to chat with a website or portal visitor. There are various reasons why initiating a chat with a visitor might be beneficial. For example, an agent evaluation the Who's On summary may notice that the pages viewed by the visitor indicate an interest in a specific product or service the company offers. By inviting the customer to chat, the agent has the opportunity to answer questions in real time and can even push additional resources to the customer. When used in conjunction with live chat, Who's On can help increase conversions and expedite customer service.

To initiate a live chat with a customer, select the customer. Then click the Actions menu and select the appropriate option:

• Invite to Live Chat - Sends a live chat invitation to the visitor.

• Force to Live Chat - Opens a live chat with the visitor. Note: This option bypasses the invitation stage of the chat process--it does not force the visitor to participate in the chat. The visitor may close the chat box without responding.

Agents can also initiate a live chat from the density map by clicking on a pin and clicking Invite to Live Chat .

For more information about live chat, see Live Chats Overview .

Pushing Additional Resources to Visitors

On occasion, an agent may want to provide a visitor with additional resources, such as a Web page or KB article. For example, a realty agency may use this feature to provide additional property information or alternative properties to site visitors as they browse. For information about how to push pages, see Viewing Live Chats .

Reports

Reports Overview

The practice of routinely generating and evaluating reports provides the business intelligence companies need to uncover problems, establish policies, and accurately measure results. SmarterTrack helps managers spot trends and improve employee performance with powerful reports that can be emailed on a regularly scheduled basis to a targeted audience.

Summary and Trend Reports

SmarterTrack includes more than 70 predefined summary and trend reports:

- Summary reports can be used to evaluate performance of individual products, departments, or agents over days, weeks, or months. Summary report data is most often represented using a bar graph. For example, a manager would use a summary report to determine which agent had the heaviest ticket workload during a particular month.
- Trend reports can be used to detect performance trends over time. Trend report data is most often represented using a line graph. For example, a support manager would use a summary report to determine which business days yielded the most support requests during the first quarter.

Report items can be grouped and filtered to create custom reports. With summary, trend, and custom reporting, SmarterTrack provides managers with the information they need to make educated business decisions. Note: Report availability may vary by role and/or permissions.

Summary Reports

Audit Reports

To access audit reports, click the reports icon . Then expand the Summary Reports and Audit Reports folders. The following audit reports are available:

• Abandoned Chats - Shows the number of live chats to which agents failed to respond.
• Agent-Group Activity - Shows status changes to active groups for live chat or ticket receipts at the department, group, or agent levels. This report is useful for seeing the specifics about the activity of agents.
• Agent Web Sessions - Shows the Web sessions for a single agent or multiple agents during a set time period. This report is useful for monitoring the activity of staff. Note: Sessions within three minutes of one another are joined and considered the same session for reporting purposes.
• Call Time Logs - Shows the amount of time agents spent working with customers via phone calls. Note: Only calls with time logs are included in this report.
• Chat Time Logs - Shows the amount of time agents spent working with customers via live chat. Note: Only chats with time logs are included in this report.
• Coverage Time - Shows the number of hours and minutes that are covered by at least one active agent for each department or group during a set time period. Chat and ticket coverage are reported separately because agents can become active in those areas separately.
• Deletions - Shows the number of deleted tickets and/or live chats currently in the system. Note: Purged items are not included in this report.
• Ticket Time Logs - Shows the amount of time agents spent working with customers via tickets. Note: Only tickets with time logs are included in this report.
• Transfers - Shows the transfer activity of tickets and/or live chats.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Billable - Indicates whether the time log hours are billable hours.
• Category - The category the time log is assigned to.
• Chat Coverage Percent - The percentage of business hours that a department's live chat is covered by at least one active agent.
• Chat Coverage Time - The total amount of time live chats are available.
• Department - The specific department.
• Date - The time frame during which the event occurs.
• Elapsed Time - The total amount of time the agent was logged into SmarterTrack.
• Email Address - The customer's email address.
• Group - The specific group.
• Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
• Name - The customer's name.

• Outgoing Chat Transfers - The total number of live chats transferred from a specific department to another department.
• Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
• Subject - The title of the time log.
• Ticket Coverage Percent - The percentage of business hours that a department has at least one active agent available to receive tickets.
• Ticket Coverage Time - The total amount of time that a department has at least one active agent available to receive tickets.
• Time In - The time the agent logged into SmarterTrack.
• Time Out - The time the agent logged out of SmarterTrack. Note: If the agent is logged in when the report is created, the time out will reflect the current time.
• Total Calls Deleted - The total number of deleted call logs currently in the system. Note: Purged call logs are not included in this report.
• Total Chats Deleted - The total number of deleted live chats currently in the system. Note: Purged live chats are not included in this report.
• Total Tickets Deleted - The total number of deleted tickets currently in the system. Note: Purged tickets are not included in this report.
• Wait Time - The amount of time that has elapsed since the agent last responded to the ticket or live chat.
• User - The specific agent.

Call Log Reports

To access call log reports, click the reports icon . Then expand the Summary Reports and Calls folders. The following cost reports are available:

• Calls Overview - Shows an overall view of the organization's call usage during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Average Session Length - The average length of the calls in minutes.
• Department - The specific department.
• Group - The specific group.
• Total Calls - The total number of calls that occurred during the time frame.
• Total Incoming Calls - The total number of incoming calls that occurred during the time

frame.
• Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand the Summary Reports and Canned Replies folders. The following canned reply reports are available:

• Canned Reply Contribution - Shows the number of canned replies an agent has created, edited, review, flagged, deleted, or inserted into tickets during a set time period. This report is useful for identifying how much or how little an agent uses canned replies in ticket responses and summarizes each agent's contribution towarnds the contents of the canned reply system.
• Canned Reply Popularity - Shows the number of times a canned reply was used and the number of agents that used each canned reply during a set time period. This report is useful for detecting which canned replies are frequently used and which canned replies should be phased out.
• Canned Reply Created - Shows the number of canned replies created during a set period of time. This report is useful because it provides an audit trail of all canned replies created by agents during a time period.
• Canned Reply Modified - Shows the number of canned replied edited during a set period of time. This report is useful becauase it provides an audit trail of all canned replies edited by agents during a time period.
• Canned Reply Events - Shows the number of times canned replies were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the canned reply system during a time period.
• Flagged Canned Replies - Shows the number of canned replies currently flagged for review. Note: This report is not date-specific and always shows the replies that are currently flagged.
• Stale Canned Replies - Shows the number of stale canned replies currently in the system. Note: This report is not date-specific and always shows the replies that are currently stale.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Agents Using Reply - The number of agents that used a particular canned reply.
• Date - The time frame during which the event occurs.
• Event - The event that pertains to the canned reply.
• Replies Added - The number of canned replies added to the system.
• Replies Deleted - The number of canned replies deleted from the system.
• Replies Edited - The number of canned replies edited in the system.

• Replies Flagged - The number of canned replies flagged for review in the system.
• Replies Inserted into Tickets - The number of distinct canned replies inserted into ticket responses.
• Replies Reviewed - The number of distinct canned replies reviewed by agents.
• Subject - The name of the canned reply.

Cost Analysis Reports

To access cost analysis reports, click the reports icon . Then expand the Summary Reports and Cost Reports folders.

Cost reporting is a way to estimate the amount of money that tickets and chats are costing you on a group, department, or user level. They can also be used to track costs by custom field or by end user to identify problem areas. Costs are estimated using a "per hour" amount assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available:

• Cost Summary - Shows an estimated cost of tickets and live chats by department, group, agent, or customer during a set time period. This report is useful because it allows managers to identify the most expensive areas of a company at a glance.
• Ticket Cost Breakdown - Shows a breakdown of ticket costs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
• Live Chat Cost Breakdown - Shows a breakdown of live chat by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
• Call Cost Breakdown - Shows a breakdown of call logs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Department - The specific department.
• Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
• Estimated Chat Costs - The total estimated costs for vs as per the live chat estimates the system administrator set in the group's settings and the agents' hourly rates.
• Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the system administrator set in the group's settings and the agents' hourly rates.

• Group - The specific group.
• Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
• Live Chat Time Cost - The total number of minutes charged for live chats as per the live chat estimates the system administrator set in the group's settings.
• Messages Received - The total number of live chat or ticket messages received from customers.
• Messages Sent - The total number of live chat or ticket messages sent by agents.
• Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the system administrator set in the group's settings.
• Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
• Total Calls - The total number of call logs that occurred during the time frame.
• Total Chats - The total number of live chat sessions that occurred during the time frame.
• Total New Tickets - The total number of tickets created during the time frame.
• Total Time - The total number of minutes that agents were on calls during the time frame.

Knowledge Base Reports

To access Knowledge Base reports, click the reports icon . Then expand the Summary Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available:

• KB Contribution - Shows the number of Knowledge Base articles an agent has created, edited, reviewed, flagged, or deleted during a set time period.
• KB Popularity - Shows the most viewed Knowledge Base articles by hits and visitors during a set time period. This report is useful for detecting which KB articles are frequently accessed and which KB articles need to be phased out.
• KB Searches - Shows the Knowledge Base searches made by portal visitors during a set time period. This report is uesful for identifying what visitors to your site are searching for and for evaluating the performance of search strings.
• KB Searches Without Results - Shows the Knowledge Base searches made by portal visitors that did not return any search results during a set time period. This report is useful because it helps determine which KB articles should be added or which terms should be added to existing articles.
• KB Searches Without Views - Shows the Knowledge Base searches made by portal visitors that did not result in article views during a set time period.

- KB Articles Created - Shows the number of Knowledge Base articles created during a set period of time. This report is useful because it provides an audit trail of all articles created by agents during a time period.
- KB Articles Modified - Shows the number of Knowledge Base articles edited during a set period of time. This report is useful because it provides an audit trail of all articles edited by agents during a time period.
- KB Article Events - Shows the number of times Knowledge Base articles were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the Knowledge Base during a time period.
- Flagged KB Articles - Shows the number of Knowledge Base articles currently flagged for review. Note: This report is not date-specific and always shows the articles that are currently flagged.
- Stale KB Articles - Shows the number of stale Knowledge Base articles currently in the system. Note: This report is not date-specific and always shows the articles that are currently stale.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Articles Added - The number of Knowledge Base articles added to the system.
- Articles Deleted - The number of Knowledge Base articles deleted from the system.
- Articles Edited - The number of Knowledge Base articles edited in the system.
- Articles Flagged - The number of Knowledge Base articles flagged for review in the system.
- Articles Reviewed - The number of distinct Knowledge Base articles reviewed by agents.
- Average Articles Viewed - The average number of articles a portal visitor viewed after conducting a search.
- Average Result Count - The average number of relevant articles displayed in search results.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the Knowledge Base article.
- Hits - The number of times a particular Knowledge Base article was viewed.
- Search String - The keywords queried by the portal visitor.
- Searches - The number of times a search was conducted for a particular keyword or term.
- Subject - The title of the Knowledge Base article.
- Visitors - The number of unique portal visitors that viewed a particular Knowledge Base article.
- Visitors Searching - The number of portal visitors that searched for a particular keyword or term.

Live Chat Reports

To access live chat reports, click the reports icon . Then expand the Summary Reports and Live Chat folders. The following live chat reports are available:

• Live Chat Overview - Shows an overall view of the organization's live chatt usage during a set time period. The report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
• Incoming Live Chat Messaging - Shows the details of incoming messages of live chat sessions during a set time period. This report is useful because it helps to identify the average load of chat sessions and areas to increase or decrease message targets. Note: This report only applies to live chat initiated by customers.
• Incoming Live Chat Response Time - Shows the amount of time customers waited for a live chat response from agents during a set time period. This report is useful because it helps to identify problem areas where agents may be giong too long between messages. Note: This report only applies to live chats initiated by customers.
• Incoming Live Chat Abandonment Time - Shows the abandonment rate for incoming live chats during a set time period. This report can be used to locate the ares in which more agents may be required or max chat settings may need adjusted to meet demand.
• Outgoing Live Chat Messaging - Shows the details of outgoing messages of live chat sessions during a set time period. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Response Time - Shows the amount of time customers wait for a live chat response from agents during a set time period. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Performance - Shows the total number of forced live chats and the total number of live chats invitations sent, ignored, accepted, and rejected for a specific department, group, or agent during a set time period. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Results - Shows the results of live chat invitations initiated by agents.

Depending on the report selected, the following report items are available:

• Accepted Chats With Response - The total number of live chat invitations to which customers accepted and responded.
• Accepted Chats Without Response - The total number of live chat invitations to which customers accepted but did not respond.
• Agent - The specific agent.
• Agents Using Reply - The number of agents that used a particular canned reply.

• Average Initial Response Time - The average number of seconds before the agent replies to the initial message from the customer.
• Average Longest Response Time - The average longest response time of all live chat sessions.
• Average Messages Received Per Chat - The average number of messages received during a live chat session.
• Average Messages Sent Per Chat - The average number of messages sent during a live chat session.
• Average Response Time - The average amount of time before an agent replied to a live chat message.
• Average Session Length - The average amount of time that a customer spent in a live chat.
• Department - The specific department.
• Forced Chats With Response - The total number of forced live chats to which customers responded.
• Forced Chats Without Response - The total number of forced live chats customers ignored.
• Group - The specific group.
• Messages Received - The total number of messages received from customers.
• Messages Sent - The total number of messages sent by agents.
• Time in Queue - The amount of time the live chat was in the queue before it was transferred to an agent.
• Total Accepted Chats - The total number of live chat invitations accepted by customers.
• Total Chats - The total number of live chat sessions that occurred during the time frame.
• Total Forced Chats - The total number of live chats forced by agents through WhosOn.
• Total Invited Chats - The total number of live chat invitations sent to customers through Who's On.
• Total Invites Ignored - The total number of live chat invitations ignored by customers.
• Total Outgoing Chats - The total number of forced live chats and the total number of live chat invitations sent by agents through Who's On.
• Total Rejected Chats - The total number of live chat invitations rejected by customers.

News Reports

To access news reports, click the reports icon . Then expand the Summary Reports and News Reports folders. The following news reports are available:

• News Contribution - Shows the number of news items an agent has created, edited, reviewed, flagged, or deleted during a set time period.
• News Popularity - Shows the most viewed news items by hits and visitors during a set time period. This report is useful for detecting which news items are popular.

• News Items Created - Shows the number of news items created during a set period of time. This report is useful because it provides an audit trail of all news items created by agents during a time period.
• News Items Modified - Shows the number of news items edited during a set period of time. This report is useful because it provides an audit trail of all news items edited by agents during a time period.
• News Items Events - Shows the number of times news items were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the news system during a time period.
• Flagged News Items - Shows the number of news items currently flagged for review. Note: This report is not date-specific and always shows the news items that are currently flagged.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Date - The time frame during which the event occurs.
• News Items Added - The number of news items added to the system.
• News Items Deleted - The number of news items deleted from the system.
• News Items Edited - The number of news items edited in the system.
• News Items Flagged - The number of news items flagged for review in the system.
• News Items Reviewed - The number of distinct news items reviewed by agents.
• Average News Items Viewed - The average number of news items a portal visitor viewed after conducting a search.
• News Item Date - The date the news item was published.
• Event - The event that pertains to the news item.
• Hits - The number of times a particular news items was viewed.
• Subject - The title of the news item.
• Visitors - The number of unique portal visitors that viewed a particular news item.

Survey Reports

To access survey reports, click the reports icon . Then expand the Summary Reports and Survey Reports folders. The following survey reports are available:

• Survey Conversion Rate - Shows the number of surveys completed by customers compared to the number of surveys offered by agents during a set time period.
• Survey Performance - Shows the average rating of each survey.

Depending on the report selected, the following report items are available:

• Average Rating - The average overall score that the survey received.
• Conversion Rate - The percentage of surveys offered that were completed by customers.
• Survey Name - The name of the survey offered.
• Surveys Answered - The number of surveys completed by customers.
• Surveys Offered - The number of surveys offered to customers.

Note: A breakdown of survey results by level, agent, or survey is not available from the reporting section. This information is available in the survey section. To access this section, click the Knowledge button on the main toolbar and then click the Surveys navigation pane. Then expand Survey Results in the left tree view.

Ticket Reports

To access Ticket reports, click the reports icon . Then expand the Summary Reports and Tickets folders. The following Ticket reports are available:

• Tickets Overview - Shows an overall view of the organization's ticket sources during a set time period. This report is useful because it shows the source of tickets for each department, which can help managers analye deparment loads.
• New Ticket Sources - Shows the methods customers used to submit tickets during a set time period.
• Re-opened Ticket Sources - Shows the number of re-opened tickets by roles for a specific department during a set time period.
• Ticket Statuses - Shows an overall view of the organizations ticket workload by status during a set time period. This report is useful in helping managers rebalance teams and change ticket weights effectively.
• Ticket Response Times - Shows the amount of time customers waited for a ticket response from agents during a set time period. Note: 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 - Shows the overall activity of tickets by department, group, or agent during a set time period. This report focuses on the internal workload generated by tickets and time time required to actually resolve the issue.
• Ticket Workload - Shows the ticket workload by department, group, or agent. This report can be used to quickly identify how each team or agent is performing relative to others and to identify potential staffing changes.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.
• Average Messages Received Per Ticket - The average number of messages received before a ticket issue is resolved.
• Average Messages Sent Per Ticket - The average number of messages sent by agents before a ticket issue is resolved.
• Average Response Time - The average amount of time before an agent replied to a ticket.
• Average Time To Close - The average amount of time a ticket was in active status.
• Group - The specific group.
• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
• Messages Received - The total number of messages received from customers.
• Messages Sent - The total number of messages sent by agents.
• New Tickets By Agents - The total number of tickets created by agents.
• New Tickets By Email - The total number of tickets submitted by customers via email.
• New Tickets By Web Interface - The total number of tickets submitted by customers via the portal.
• Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
• Re-opened Tickets By Agents - The total number of tickets re-opened by agents.
• Re-opened Tickets By Users - The total number of tickets re-opened by users.
• Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
• Total Closed Tickets - The total number of closed tickets.
• Total New Tickets - The total number of tickets created during the time frame.
• Total Open Tickets - The total number of active tickets.
• Total Re-opened Tickets - The total number of tickets that were re-opened during the time frame.
• Total Tickets Locked - The total number of tickets that were closed and locked (cannot be re-opened) during the time frame.
• Total Tickets Replied To - The total number of tickets agents replied to.

Time Log Reports

To access time log reports, click the reports icon . Then expand the Summary Reports and Time Logs folders. The following time log reports are available:

• Call Time Log Overview - Shows an overall view of the organization's time log usage for calls during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
• Chat Time Log Overview - Shows an overall view of the organization's time log usage for live chats during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
• Ticket Time Log Overview - Shows an overall view of the organization's time log usage for tickets during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

• Total Billable Time Logged - The total amount of billable time logged during the time frame.
• Total Billable Time Logs - The total number of billable time logs that occured during the time frame.
• Total New Billable Time Logs - The total number of billable time logs created during the time frame.
• Total New Time Logs - The total number of new time logs created during the time frame.
• Total Time Logged - The total amount of billable time that occured during the time frame.

Trend Reports

Call Trend Reports

To access call log reports, click the reports icon . Then expand the Trend Reports and Calls folders. The following call log trend reports are available:

• Call Overview - Shows an overall view of the organization's call usage over time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Average Session Length - The average length of the calls in minutes.
• Department - The specific department.
• Group - The specific group.
• Total Calls - The total number of calls that occurred during the time frame.
• Total Incoming Calls - The total number of incoming calls that occurred during the time

frame.
• Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand the Trend Reports and Canned Replies folders. The following canned reply reports are available:

• Canned Reply Contribution Trend - Shows the number of times canned replies were created, edited, review, flagged, deleted, or inserted into tickets during a set time period.
• Canned Reply Popularity Trend - Shows the number of times agents used canned replies and the number of agents using canned replies reply during a set time period.

Depending on the report selected, the following report items are available:

• Agent - The specific agent.
• Agents Using Reply - The number of agents that used canned replies.
• Replies Added - The number of canned replies added to the system.
• Replies Deleted - The number of canned replies deleted from the system.
• Replies Edited - The number of canned replies edited in the system.
• Replies Flagged - The number of canned replies flagged for review in the system.
• Replies Inserted into Tickets - The number of canned replies inserted into ticket responses.
• Replies Reviewed - The number of canned replies reviewed by agents.
• Times Used - The number of times agents used canned replies.

Cost Analysis Trend Reports

To access cost analysis reports, click the reports icon . Then expand the Trend Reports and Cost Reports folders.

Cost reporting is a way to estimate the amount of money that tickets and chats are costing you on a group, department, or user level. They can also be used to track costs by custom field or by end user to identify problem areas. Costs are estimated using a "per hour" amount assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available:

• Cost Trend - Shows an estimated cost of tickets, live chats, and call logs by department, group, agent, or customer over time. This report is useful because it allows managers to see how estimated costs are changing over time.
• Ticket Cost Trend - Shows a breakdown of ticket costs by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.

• Live Chat Cost Trend - Shows a breakdown of live chat by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.
• Call Cost Trend - Shows a breakdown of calls by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.

Depending on the report selected, the following report items are available:

• Live Chat Time Cost - The total number of minutes charged for live chat as per the formulas set in group configuration.
• Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
• Estimated Chat Costs - The total estimated costs for live chats as per the live chat estimates the system administrator set in the group's settings and the agents' hourly rates.
• Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the system administrator set in the group's settings and the agents' hourly rates.
• Estimated Total Costs - The total estimated costs of tickets, calls, and live chats per the estimates the system administrator set in the group's settings and the agents' hourly rates.
• Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
• Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the system administrator set in the group's settings.
• Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
• Total Calls - The total number of call logs that occurred during the time frame.
• Total Chats - The total number of live chat sessions that occurred during the time frame.
• Total Incoming Calls - The total number of incoming calls that occurred during the time frame.
• Total New Tickets - The total number of tickets created during the time frame.
• Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

Knowledge Base Trend Reports

To access Knowledge Base reports, click the reports icon . Then expand the Trend Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available:

• KB Contribution Trends - Shows the number of Knowledge Base articles created, edited, reviewed, flagged, or deleted over time.
• KB Popularity Trend - Shows the most viewed Knowledge Base articles by hits and visitors

over time.

• KB Search Trend - Shows the Knowledge Base searches made by portal visitors over time. This report is useful because it helps managers gauge whether their Knowledge Base is becoming more or less effective over time.

Depending on the report selected, the following report items are available:

• Articles Added - The number of Knowledge Base articles added to the system.
• Articles Deleted - The number of Knowledge Base articles deleted from the system.
• Articles Edited - The number of Knowledge Base articles edited in the system.
• Articles Flagged - The number of Knowledge Base articles flagged for review in the system.
• Articles Reviewed - The number of distinct Knowledge Base articles reviewed by agents.
• Average Articles Viewed - The average number of articles a portal visitor viewed after conducting a search.
• Average Result Count - The average number of relevant articles displayed in search results.
• Hits - The number of times a particular Knowledge Base article was viewed.
• Visitors - The number of unique portal visitors that viewed a particular Knowledge Base article.
• Visitors Searching - The number of portal visitors that searched for a particular keyword or term.

Live Chat Trend Reports

To access live chat reports, click the reports icon . Then expand the Trend Reports and Live Chat folders. The following live chat reports are available:

• Live Chat Overview Trend - Shows an overall view of the organization's live chat usage over time. This report is useful because it provides managers with an at-a-glance view of the company and can help identify areas to investigate with more detailed reports.
• Incoming Live Chat Messaging Trend - Shows the details of incoming messages of live chat sessions over time. This report is useful because it can identify if chat sessions are getting more or less chatty over time. Note: This report only applies to live chat initiated by customers.
• Incoming Live Chat Response Time Trend - Shows the amount of time customers waited for a live chat response from agents over time. This report is useful because it can help managers identify problem areas in which agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
• Incoming Live Chat Abandonment Time Trend - Shows the relationship between wait time in the queue and abandonment rates over time. This report is useful in forecasting when more agents may be nedded or when max chat settings need to be adjusted to meet demand.

• Outgoing Live Chat Messaging Trend - Shows the details of outgoing messages of live chat sessions over time. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Response Time Trend - Shows the amount of time customers wait for a live chat response from agents over time. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Performance Trend - Shows the total number of forced live chats and the total number of live chats invitations sent, ignored, accepted, and rejected for a specific department, group, or agent over time. Note: This report only applies to live chats initiated by agents.
• Outgoing Live Chat Results Trend - Shows the results of live chat invitations initiated by agents.

Depending on the report selected, the following report items are available:

• Accepted Chats With Response - The total number of live chat invitations to which customers accepted and responded.
• Accepted Chats Without Response - The total number of live chat invitations to which customers accepted but did not respond.
• Agent - The specific agent.
• Agents Using Reply - The number of agents that used a particular canned reply.
• Average Initial Response Time - The average number of seconds before the agent replies to the initial message from the customer.
• Average Longest Response Time - The average longest response time of all live chat sessions.
• Average Messages Received Per Chat - The average number of messages received during a live chat session.
• Average Messages Sent Per Chat - The average number of messages sent during a live chat session.
• Average Response Time - The average amount of time before an agent replied to a live chat message.
• Average Session Length - The average amount of time that a customer spent in a live chat.
• Forced Chats With Response - The total number of forced live chats to which customers responded.
• Forced Chats Without Response - The total number of forced live chats customers ignored.
• Messages Received - The total number of messages received from customers.
• Messages Sent - The total number of messages sent by agents.
• Time in Queue - The amount of time the live chat was in the queue before it was transferred to an agent.
• Total Accepted Chats - The total number of live chat invitations accepted by customers.

• Total Chats - The total number of live chat sessions that occurred during the time frame.

• Total Forced Chats - The total number of live chats forced by agents through WhosOn.

• Total Invited Chats - The total number of live chat invitations sent to customers through Who's On.

• Total Invites Ignored - The total number of live chat invitations ignored by customers.

• Total Outgoing Chats - The total number of forced live chats and the total number of live chat invitations sent by agents through Who's On.

• Total Rejected Chats - The total number of live chat invitations rejected by customers.

News Trend Reports

To access news reports, click the reports icon . Then expand the Trend Reports and News Reports folders. The following news reports are available:

• News Contribution Trend - Shows the number of news items created, edited, reviewed, flagged, or deleted over time.

• News Popularity Trend - Shows the most viewed news items by hits and visitors over time.

Depending on the report selected, the following report items are available:

• News Items Added - The number of news items added to the system.

• News Items Deleted - The number of news items deleted from the system.

• News Items Edited - The number of news items edited in the system.

• News Items Flagged - The number of news items flagged for review in the system.

• News Items Reviewed - The number of distinct news items reviewed by agents.

• Hits - The number of times a particular news items was viewed.

• Visitors - The number of unique portal visitors that viewed a particular news item.

Survey Trend Reports

To access survey reports, click the reports icon . Then expand the Trend Reports and Survey Reports folders. The following survey reports are available:

• Survey Conversion Rate Trend - Shows the number of surveys completed by customers compared to the number of surveys offered by agents over time.

• Survey Performance Trend - Shows the average rating of surveys over time.

Depending on the report selected, the following report items are available:

• Average Rating - The average overall score of surveys over time.

• Conversion Rate - The percentage of surveys offered that were completed by customers.

• Surveys Answered - The number of surveys completed by customers.
• Surveys Offered - The number of surveys offered to customers.

Note: A breakdown of survey results by level, agent, or survey is not available from the reporting section. This information is available in the survey section. To access this section, click the Knowledge button on the main toolbar and then click the Surveys control bar. Then expand Survey Results in the left tree view.

Ticket Trend Reports

To access Ticket reports, click the reports icon . Then expand the Trend Reports and Tickets folders. The following Ticket trend reports are available:

• Tickets Overview Trend - Shows an overall view of the organization's Ticket sources over time.
• New Ticket Source Trend - Shows the methods customers used to submit Tickets over time.
• Re-opened Ticket Source Trend - Shows the number of re-opened Tickets by roles for a specific department over time. This report is useful because it shows how the source of re-opened Tickets has changed.
• Ticket Status Trend - Shows an overall view of the organizations Ticket workload by status over time. This report is useful because it shows how workload has changed and provides the information needed to rebalance teams, predict trends, or change Ticket weights effectively.
• Ticket Response Time Trend - Shows the amount of time customers waited for a Ticket response from agents over time. 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 - Shows overall activity of Tickets over time. This report is useful because is shows the change in internal workload generated by Tickets and the time required to actually resolve the issue.
• Ticket Workload Trend - Shows overall Ticket workload over time. This report is useful for identifying potential staffing change needs.

Depending on the report selected, the following report items are available:

• Average Follow-up Response Time - The average amount of time before agents replied to Tickets.
• Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.
• Average Messages Received Per Ticket - The average number of messages received before a Ticket issue is resolved.

- Average Messages Sent Per Ticket - The average number of messages sent by agents before a Ticket issue is resolved.
- Average Response Time - The average amount of time before an agent replied to a Ticket.
- Average Time Open and Active - The average amount of time a Ticket was in active status.
- Department - The specific department name.
- Group - The specific group name.
- Incoming Ticket Transfers - The total number of Tickets transferred to a specific department from another department.
- Messages Received - The total number of messages received from customers.
- Messages Sent - The total number of messages sent by agents.
- New Tickets By Agents - The total number of Tickets created by agents.
- New Tickets By Email - The total number of Tickets submitted by customers via email.
- New Tickets By Web Interface - The total number of Tickets submitted by customers via the portal.
- Re-opened Tickets By Agents - The total number of Tickets re-opened by agents.
- Re-opened Tickets By Users - The total number of Tickets re-opened by users.
- Tickets Assigned From Queue - The total number of Tickets that were assigned to an agent after spending time in the queue.
- Total Closed Tickets - The total number of closed Tickets.
- Total Modified Tickets - The total number of Tickets that changed status or priority. Note: This includes Tickets that agents replied to regardless of their status in the system.
- Total New Tickets - The total number of Tickets created.
- Total Open Tickets - The total number of active Tickets.
- Total Re-opened Tickets - The total number of Tickets re-opened.
- Total Tickets Auto-closed - The total number of Tickets that automatically closed.
- Total Tickets Locked - The total number of Tickets that were closed and locked.
- Total Tickets Replied To - The total number of Tickets agents replied to.

Time Log Trend Reports

To access time log trend reports, click the reports icon . Then expand the Trend Reports and Time Logs folders. The following time log reports are available:

- Call Time Log Overview - Shows an overall view of the organization's time log usage for callsover time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Chat Time Log Overview - Shows an overall view of the organization's time log usage for live chats over time. This report is useful because it provides an at-a-glance view of the company

and can identify other areas to investigate with other detailed reports.

• Ticket Time Log Overview - Shows an overall view of the organization's time log usage for tickets over time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

• Total Billable Time Logged - The total amount of billable time logged.
• Total Billable Time Logs - The total number of billable time logs that occured.
• Total New Billable Time Logs - The total number of billable time logs created.
• Total New Time Logs - The total number of new time logs created.
• Total Time Logged - The total amount of billable time that occured.

Events

Events Overview

SmarterTrack can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, system administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

SmarterTrack's events system can also automate actions to streamline operations. For example, the system administrator can configure an event so that the system automatically sends live chat invitations to idle portal visitors.

There are two categories of events in SmarterTrack: user-level events and system-level events:

• User-level events are specific to each user.
• System-level events can only be set by system administrators.

To view user-level events, click the events icon . Then expand My Events and click All Events in the navigation pane. Any user-level events will load in the content pane. Events can also be viewed by event group or category (chat room, knowledge base, tickets, etc.).

To view system-level events, click the events icon . Then expand System Events and click All Events in the navigation pane. Any system-level events will load in the content pane. Events can also be viewed by event group or category (chat room, knowledge base, tickets, etc.). Note: Only system administrators can access system-level events.

Navigating Your Events

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the toolbar.
- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (tickets, survey, Who's On, etc.).
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered. Actions include emails, notifications, logging, and other event-specific functions.

Performing Event Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new event.
- Edit - Allows the agent to make changes to an event's settings.
- Delete - Permanently deletes the selected event(s).
- Search - Allows the agent to search for a specific event.

To view the settings for a specific event, simply double-click the event and the event settings will load in the content window.

Creating New Events

To add a new user-level event, click the events icon . Then expand My Events and click New in the content pane toolbar.

To add a new system-level event, click the events icon . Then expand My Events and click New in the content pane toolbar. Notes: Only system administrators can add system-level events.

This will open a new event window with the following fields:

- Name - The name of the event.
- Category - The feature to which the event pertains (Tickets, survey, Who's On, etc.)
- Type - The event that triggers the action.
- Group - The folder in which the event is saved.

After completing the fields in the new event window, the following tabs will load in the content pane:

Options

Use this tab to edit the following settings:

- Name - The name of the event.
- Event Group - The folder in which the event is saved.
- Event Type - The event that triggers the action.

Depending on the event category and type selected, different event action criteria will be available. For more information on the various event action criterions, see the corresponding event category page of the online help.

Actions

If the actions tab is blank, click Add Action to edit the following settings:

- Action - The action that occurs when an event is triggered.
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list.

Other options may be available depending on the event category chosen.

Call Log Events

System administrators and agents can receive notifications or automate actions based on the following call log events:

- Call Log Attached to Ticket
- Call Log Created
- Call Log Deleted
- Call Log Detached from Ticket
- Call Log Modified
- Call Log Time Log Created

Depending on the event selected, the following event criteria are available:

- Acting Agent - The agent that added a comment to the call log.
- Agent Assigned - The agent assigned to the call log.
- Department - The department that will trigger the event.
- Description - The words that will trigger the event if found within the description of the call log.
- Email Address - The email address that SmarterTrack uses to send email.
- End Date - The ending date of the call.

• Group - The group that will trigger the event.
• Incoming Call - The type of call that will trigger the event. Note: If the type of call is an incoming call, type "true" in the field. If it is not, type "false" in the field.
• Name - The name that will trigger the event.
• Phone Number - The phone number that will trigger the event.
• Keywords - The words that will trigger the event if listed as article keywords.
• Start Date - The start date of the call.
• Subject - The words that will trigger the event if found within the call log subject.
• Time Log Category - The time log category that will trigger the event.
• Time Log Description - The words that will trigger the event if found within the description of the time log.
• Time Log Duration Minutes - The length of the time log.
• Time Log End Date - The ending date of the time log.
• Time Log Start Date - The start date of the time log.
• Time Log Subject - The words that will trigger the event if found within the time log subject.
• Time Log is Billable -
• Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

• Log to File
• Log to File (once for each item)
• Notify External Provider
• Send Email
• Send Email (once for each item)
• Transfer Call Log
• Use Default Notification Profile for User
• Use Default Notification Profile for User (once per item)
• Use My Notificaton Profile
• Use My Notificaton Profile (once per item)

Chat Room Events

System administrators and agents can receive notifications or automate actions based on the following chat room events:

• Chat Room Invite
• Chat Room Joined
• Chat Room Left

Depending on the event selected, the following event criteria are available:

- Agent - The agent that invited, joined, or left the agent-to-agent chat.
- Chat Room Name - The name of the chat room that triggers the event.
- Sent Message - The words that will trigger the event if found within a sent message of the chat.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Log to File
- Notify External Provider
- Send Email
- Use My Notification Profile

Live ChatEvents

System administrators and agents can receive notifications or automate actions based on the following live chat events:

- Live Chat Attached to Ticket
- Live Chat Comment Added
- Live Chat Count for Agent
- Live Chat Count for Department
- Live Chat Count for Group
- Live Chat Deleted
- Live Chat Detached from Ticket
- Live Chat Ended
- Live Chat Idle
- Live Chat Incoming Message
- Live Chat Outgoing Message
- Live Chat Started
- Live Chat Time Log Created
- Live Chat Transferred

Depending on the event selected, the following event criteria are available:

- Acting Agent -
- Agent Assigned - The agent assigned to the live chat.
- Average Idle Minutes -

- Customer Email - The customer's email address.
- Customer IP - The customer's IP address.
- Customer Name - The name of the customer.
- Customer Username - The customer's username.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Language - The language that will trigger the event.
- Longest Idle Minutes -
- Messages Sent - The number of messages sent during the live chat.
- Messages Received - The number of messages received during the live chat.
- Open Date - The date the live chat was initiated.
- Question - The words that will trigger the event if found within a the text of the chat.
- Ticket Number - The ticket number that will trigger the event.
- Time Log Category - The time log category that will trigger the event.
- Time Log Description - The words that will trigger the event if found within the description of the time log.
- Time Log Duration Minutes - The length of the time log.
- Time Log End Date - The ending date of the time log.
- Time Log Start Date - The start date of the time log.
- Time Log Subject - The words that will trigger the event if found within the time log subject.
- Time Log is Billable -
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- End Live Chat
- Log to File
- Log to File (once for each item)
- Notify External Provider
- Send Email
- Send Email (once for each item)
- Transfer Live Chat
- Use Default Notification Profile for User
- Use Default Notification Profile for User (once per item)
- Use My Notification Profile
- Use My Notification Profile (once per item)

Knowledge Base Events

System administrators and agents can receive notifications or automate actions based on the following knowledge base events:

- KB Article Created
- KB Article Deleted
- KB Article Flagged for Review
- KB Article Modified
- KB Article Reviewed
- KB Article Stale

Depending on the event selected, the following event criteria are available:

- Agent - The agent that modifies or creates articles.
- Article Title - The words that will trigger the event if found within the article title.
- Body Text - The words that will trigger the event if found within the body of the article.
- Flagged for Review - The article status that will trigger the event.
- Folder - The folder in which the knowledge base article is saved.
- Keywords - The words that will trigger the event if listed as article keywords.
- Marked as Draft - The article status that will trigger the event.
- Marked as Private - The article status that will trigger the event.
- Summary - The words that will trigger the event if found within the article summary.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Alter Item Properties
- Log to File
- Log to File (once per item)
- Notify External Provider
- Send Email
- Send Email (once per item)
- Use My Notification Profile
- Use My Notification Profile (once per item)

POP Events

System administrators can receive notifications or automate actions based on the following POP events:

• POP Connection Failed
• POP Download Failed
• POP Import Failed
• POP Login Failed

Depending on the event selected, the following event criteria are available:

• Time of Day - The time frame during which the event occurs.
• Server Name - The name of the server that SmarterTrack failed to connect to.
• Server Port - The port that SmarterTrack attempted to connect to on the server.
• Login Username - The username used to authenticate with the server.
• SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.

Depending on the event selected, the following actions are available:

• Log to File
• Notify External Provider
• Send Email
• Use My Notification Profile

SMTP Events

System administrators can receive notifications or automate actions based on the following SMTP events:

• SMTP Connection Failed
• SMTP Delivery Failed
• POP Login Failed

Depending on the event selected, the following event criteria are available:

• Time of Day - The time frame during which the event occurs.
• SMTP Name - The name of the server that SmarterTrack failed to connect to.
• Server Port - The port that SmarterTrack attempted to connect to on the server.
• Email Address - The email address that SmarterTrack uses to send email.
• SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.
• Requires Authentication - The authentication required connect to the server. Note: If the server requires authentication, type "true" in the field. If it does not, type "false" in the field.
• Customer Email - The customer's email address.

Depending on the event selected, the following actions are available:

- Log to File
- Notify External Provider
- Send Email
- Use My Notification Profile

Survey Events

System administrators and agents can receive notifications or automate actions based on the following survey event:

- Survey Answered

Depending on the event selected, the following event criteria are available:

- Time of Day - The time frame during which the event occurs.
- Survey Name - The survey that triggers the event.
- Survey Rating - The rating that triggers the event.

Depending on the event selected, the following actions are available:

- Log to File
- Notify External Provider
- Send Email
- Use My Notification Profile

Task Events

System administrators and agents can receive notifications or automate actions based on the following Task events:

- Task Created
- Task Deleted
- Task Due
- Task Modified
- Task Started

Depending on the event selected, the following event criteria are available:

- Acting Agent -
- Agent Assigned - The agent assigned to the task.
- Description - The words that will trigger the event if found within the description of the task.

- Due Date - The due date of the task.
- Priority - The priority level that will trigger the event.
- Related Item -
- Status - The task status that will trigger the event.
- Start Date - The start date of the task.
- Subject - The words that will trigger the event if found within the task subject.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Log to File
- Log to File (once per item)
- Notify External Provider
- Send Email
- Send Email (once per item)
- Set Task Priority
- Set Task Status
- Transfer Task
- Use Default Notification Profile for User
- Use Default Notification Profile for User (once per item)
- Use My Notification Profile
- Use My Notification Profile (once per item)

Ticket Events

System administrators and agents can receive notifications or automate actions based on the following ticket events:

- Ticket Commend Added
- Ticket Count for Agent
- Ticket Count for Group
- Ticket Count for Department
- Ticket Created
- Ticket Deleted
- Ticket Followed Up
- Ticket Follow-up Scheduled
- Ticket Idle
- Ticket Messages Received
- Ticket Messages Sent

- Ticket Priority Changed
- Ticket Status Changed
- Ticket Time Log Created
- Ticket Transferred

Depending on the event selected, the following event criteria are available:

- Acting Agent - The agent that added a comment to the ticket.
- Agent Assigned - The agent assigned to the ticket.
- Body Text - The words that will trigger the event if found within the body of the ticket.
- Comment Type - The type of comment (note, resolution, transfer note) that will trigger the event.
- Customer Email - The customer's email address.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Idle Minutes - The number of minutes a ticket is idle before the event is triggered.
- Messages Received - The total number of incoming tickets that will trigger the event.
- Messages Sent - The total number of outgoing tickets that will trigger the event.
- Old Agent Assigned - The agent assigned to the ticket prior to transfer.
- Old Department - The department assigned to the ticker prio to transfer.
- Old Group - The group assigned to the ticket prior to transfer.
- Pinned to Agent - The ticket status that will trigger the event.
- Priority - The priority level that will trigger the event.
- Status - The ticket status that will trigger the event.
- Subject - The words that will trigger the event if found within the ticket subject.
- Time Log Category - The time log category that will trigger the event.
- Time Log Description - The words that will trigger the event if found within the description of the time log.
- Time Log Duration Minutes - The length of the time log.
- Time Log End Date - The ending date of the time log.
- Time Log Start Date - The start date of the time log.
- Time Log Subject - The words that will trigger the event if found within the time log subject.
- Time Log is Billable -
- Time of Day - The time frame during which the event occurs.
- Waiting Tickets - The total number of waiting Tickets that will trigger the event.

Depending on the event selected, the following actions are available:

- Log to File
- Log to File (once for each item)
- Notify External Provider
- Offer Survey
- Send Email
- Send Email (once for each item)
- Send Reply to Ticket
- Set Ticket Priority
- Set Ticket Status
- Transfer Ticket
- Use Default Notification Profile for User
- Use Default Notification Profile for User (Oonce per item)
- Use My Notification Profile
- Use My Notification Profile (once per item)

Who's On Events

System administrators and agents can receive notifications or automate actions based on the following Who's On events:

- Live Chat Accepted
- Live Chat Forced
- Live Chat Invitation Ignored
- Live Chat Invited
- Live Chat Rejected
- Online Activity

In addition to the events listed above, system administrators can receive notifications or automate actions on the following Who's On events:

- Online Visitor Purged
- Online Visitor Removed

Depending on the event selected, the following event criteria are available:

- Acting Agent - The agent that interacted with the visitor.
- Browser - The Web browser that will trigger the event.
- Country - The geographic location of the visitor that will trigger the event.
- Current Page - The Web page that will trigger the event.
- Current Page Title - The title of the current page the visitor is browsing.

• Current Referrer - The referrer that will trigger the event.
• Current Virtual Page - The virtual page that will trigger the event.
• Customer Email Address - The email address that will trigger the event.
• Customer Name - The customer that will trigger the event.
• Department - The department that will trigger the event.
• Duration Minutes - The number of minutes the visitor has been on the website or portal.
• First Chat Date - The date the customer first participated in a live chat.
• Group - The group that will trigger the event.
• Hits - The number of times a page is hit before triggering the event.
• Host Domain - The host domain that will trigger the event.
• Host Name - The host name that will trigger the event.
• Initial Page - The Web page that will trigger the event if viewed at the beginning of the customer's session.
• Initial Page Title - The title of the initial page.
• Initial Virtual Page - The virtual page that will trigger the event if viewed at the beginning of the customer's session.
• Invitation Last Sent Date - The date the customer last received a live chat invitation.
• Live Chat Invites Accepted - The number of live chat invites accepted by customers that will trigger the event.
• Live Chat Invites Ignored - The number of live chat invites ignored by customers that will trigger the event.
• Live Chat Invites Sent - The number of live chat invites sent by an agent(s) that will trigger the event.
• Live Chat Status - The live chat status that will trigger the event.
• Live Chats Forced - The number of live chats forced by an agent(s) that will trigger the event.
• Operating System - The operating system that will trigger the event.
• Region - The geographic location of the customer that will trigger the event.
• Sent Message - The words that will trigger the event if found within a sent message of the chat.
• Session Started - The time frame during which the customer visited the website or portal.
• Time of Day - The time frame during which the event occurs.
• Tracking Status - The Who's On status that will trigger the event.
• Visitor ID - The visitor ID number that will trigger the event.

Depending on the event selected, the following actions are available:

• Log to File
• Notify External Provider

- Send Email
- Use My Notification Profile

Settings

My Settings

Preferences

To edit your personal settings, click the settings icon . Then expand the My Settings folder and click Preferences in the navigation pane. The user settings will load in the content window and the following tabs will be available:

Options

Use this tab to edit the following user settings:

- Username - The username uses to login to SmarterTrack
- Authentication - The method used to login to SmarterTrack. The system administrator can choose to allow users to log in using a password or active directory authentication.
- New Password - To change the login password, type a new password in this field. Note: This option is only available if the authentication method is password.
- Confirm Password - To verify the new password, re-type it in this field. Note: This option is only available if the authentication method is password.
- Authentication Domain - The domain name of the active directory used for authentication of a login username and password.
- Email Address - The agent's email address.
- Display Name - The name used to identify the agent within the SmarterTrack system.
- Skin - To change the look and feel of the management interface, select the appropriate skin from the list.
- Time Zone - To specify the time zone, select the appropriate time zone from the list.
- Avatar - The display picture the agent uses when interacting with customers via Live Chat.
- New Image - To change the avatar, click Browse and select the appropriate file.

Roles

This tab displays the roles assigned to the users. An user's permissions are defined by the roles to which the user is assigned. For more information, see Roles . Note: Users cannot edit the roles to which they have been assigned. Only a system administrator can change a user's role .

Web Interface

Use this tab to edit the following settings:

- Items Per Page - To change the total number of items (tickets, chats, etc.) that will display on each page, type the appropriate number in this field. By default, the total number of items per page is set at 14.
- Compose Font - To change the default font type and size for tickets and live chats, select the appropriate font type and size from the lists. The default font type is Tahoma and the default font size is 10 pt.
- Preview Pane - To specify how the preview pane displays in the management interface, select the appropriate option from the list. By default, the preview pane displays on the right side of the interface. Enable Who's On - Checking this box will give the agent access to Who's On visitor monitoring. By default, this option is enabled. Note: This option is only available to system administrators and agents that have Who's On enabled. If this option is disabled, the Who's On section in the Workspace will not be available to the agent. --%>
- Enable automatic reminder popup - Checking this box will allow the agent to receive new reminders in a pop-up window. By default, this option is enabled.

Tickets

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

- Forward To - To specify an alternate email to which tickets are forwarded, type the email address in this field.
- Enabled - Checking this box will allow the agent to forward tickets to an alternate email.
- Allow Replies From - To specify an alternate email address to use when replying to tickets, type the email address in this field.
- Enable waiting ticket counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that are waiting for a customer response. By default, this option is enabled.
- Enable ticket follow-up counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that is marked as needing a follow-up. By default, this option is enabled.
- Include waiting tickets in root tree item counts - Checking this box will include tickets that are waiting for a customer response toward the total number of tickets for which an agent is responsible. By default, this option is disabled.
- Include tickets scheduled for follow-up in root tree item counts - Checking this box will

include tickets that are marked as needing a follow-up toward the total number of tickets for which an agent is responsible. By default, this option is disabled.

Live Chat

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

• Agent Alias - The alias the agent uses to interact with customers.
• Max Active Live Chats - To change the number of live chats the agent can participate in at a time, type the appropriate number in this field. By default, this option is set to 1. Enable Page Pushing - Checking this box will allow the agent to push relevant Web site pages to customers via Live Chat and Who's On. Note: This option is only available to system administrators. Agents must have Who's On enabled to push pages. --%>
• Enable automatic live chat popup - Checking this box will display new live chats in a popup window. By default, this option is enabled. Enable From Name on Invitations - Checking this box will include the agent's display name (alias) on new chat invitations. By default, this option is disabled. --%>
• Enable live chat notification sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
• Enable live chat in queue notification sound - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
• Welcome Message - To specify a default message that is displayed when a customer first enters a chat, type the message in this field.
• Default Invitation Message - To specify a default message to invite customers to live chat, type the message in this field.

This tab allows agents to create a custom signature for Ticket replies. Note: This tab is only available if the system administrator has enabled custom email footers for agents in Ticket Settings. --%>

Reporting

Use this tab to specify the following settings for reporting purposes:

• Hourly Cost - The hourly cost for the agent to work with tickets and chats. This field is used for cost analysis reporting and is set to 10.00 by default. Note: This option is only available to system administrators.

Custom Fields

This tab displays the available custom fields for user preferences. For more information on custom fields, see Field Definitions .

Notification Profiles

SmarterTrack can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, system administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

Notification profiles determine how those messages are sent. Options include text message, email, or pop-up window.

To view a list of current notification profiles, click the settings icon . Then expand the My Settings folder and click Notification Profiles in the navigation pane. All of the notification profiles for the agent will load in the content pane.

System administrators can view notification profiles for system-wide notifications by clicking the settings icon . Then expand the System Settings folder and click Notification Profiles in the navigation pane. All of the system-wide notification profiles will load in the content pane.

The following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.
- Notification Profile Name - The name of the profile.
- Type - The types of notification the agent has enabled for the selected profile.

The following options are available from the content pane toolbar:

- New - Creates a new notification profile.
- Edit - Allows the agent to edit an existing notification profile.
- Delete - Permanently deletes the selected notification profile. Search - Allows the agent to search for notification profiles. --%>

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enable - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enable - Checking this box will enable SMS notifications.

• Enable reminders - Checking this box will allow the agent to receive notifications in a pop-up window.

For more information about notification profiles and events, see Events Overview .

System Settings

General Settings

System administrators will use this section to adjust any general system settings, including company information, currency format, the default skin, and the map provider.

To access this section, click the settings icon . Then expand the System Settings folder and click General Settings in the navigation pane. The general settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following system settings:

• SmarterTrack Base URL - The URL for the SmarterTrack portal.
• Server Friendly Name - The name of the server.
• Locale for Currency - To specify the format in which currency is displayed, select the appropriate option from the list. By default, the locale is set to English (United States).
• Spell-check Dictionary - Select which dictionary SmarterTrack will use to check for spelling errors from the list.
• Default Time Zone - Select the time zone SmarterTrack will use as the default from the list.
• Default Skin - Select which skin SmarterTrack will use as the default skin from the list.
• Allow employees to override default skin - Checking this box will allow agents to override the default skin.

Features

Use this tab to enable to the following features:

• Enable employee chat rooms - Checking this box will allow employees to view and use chat rooms within the management interface. By default, this setting is enabled.
• Enable employee instant messenger - Checking this box will allow employees to view and use the instant messenger within the management interface. By default, this setting is enabled.
• Enable simultaneous login to the portal and management interface - Checing this box will allow employees to log in to both the portal and management interface at the same time.

Files

Use this tab to specify the types of files that can be uploaded to SmarterTrack.

Maps

Use this tab to specify the following map settings:

- Map Provider - Select which map provider will use from the list. Microsoft Bing Maps is the default map provider.
- Enable - Checking thos box will enable the map provider.
- Map URL - The default URL for the selected map provider.
- Provider Key - The API key provided by Google. For more information, see the KB article How To - Set Google Maps as the Map Provider for Live Chats and Who's On . Enable maps for Live Chats - Checking this box will allow the agent to see a map showing the geographic location of the customer during a Live Chat. --%>

Notification Profiles

SmarterTrack can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, system administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

Notification profiles determine how those messages are sent. Options include text message, email, or pop-up window.

To view a list of current notification profiles, click the settings icon . Then expand the My Settings folder and click Notification Profiles in the navigation pane. All of the notification profiles for the agent will load in the content pane.

System administrators can view notification profiles for system-wide notifications by clicking the settings icon . Then expand the System Settings folder and click Notification Profiles in the navigation pane. All of the system-wide notification profiles will load in the content pane.

The following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.

- Notification Profile Name - The name of the profile.
- Type - The types of notification the agent has enabled for the selected profile.

The following options are available from the content pane toolbar:

- New - Creates a new notification profile.
- Edit - Allows the agent to edit an existing notification profile.
- Delete - Permanently deletes the selected notification profile. Search - Allows the agent to search for notification profiles. --%>

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enable - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enable - Checking this box will enable SMS notifications.
- Enable reminders - Checking this box will allow the agent to receive notifications in a pop-up window.

For more information about notification profiles and events, see Events Overview .

External Providers

System administrators with programming knowledge can extend the functionality of SmarterTrack through the use of external providers. By integrating external providers into SmarterTrack, companies can:

- Integrate their login system to LDAP.
- Copy the user's ID that the 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.
- And more.

For additional details, including a sample application and documention on implementation, dowload this sample external provider .

Options

Use this tab to enable external providers:

• Enable login provider - Checking this box will enable the login provider and allow the system administrator to configure the settings on the corresponding external provider tab.
• Enable custom field provider - Checking this box will enable the custom field provider and allow the system administrator to configure the settings on the corresponding external provider tab.
• Enable ticket provider - Checking this box will enable the ticket provider and allow the system administrator to configure the settings on the corresponding external provider tab.
• Enable live chat provider - Checking this box will enable the live chat provider and allow the system administrator to configure the settings on the corresponding external provider tab.
• Enable user information provider - Checking this box will enable the user information provider and allow the system administrator to configure the settings on the corresponding external provider tab.
• Enable events provider - Checking this box will enable the events provider and allow the system administrator to configure the settings on the corresponding external provider tab.

Login

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. System administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

• Web Service URL - The URL to the Web service.
• Web Service Password - The password used to authenticate the Web service.
• Forgot Password URL - The URL used to recover password information for SmarterTrack users.
• Default Role for Users - To specify whether users are considered registered or anonymous after logging in, select the appropriate option from the list. Note: If users are considered anonymous, the system administrator will have to manually grant the user role to new users. For this reason, it is recommended to select registered users as the default role.
• Mark email addresses as verified - Checking this box will automatically verify that email addresses for users are valid.
• Enable single sign-on cookies from other sites - Checking this box will allow the Web service to accept session cookies from another site.

Custom Field

A custom field provider can be implemented to allow a custom set of fields to be displayed when creating tickets and live chats. The custom field provider is called when a ticket or live chat is first created and allows the system administrator to add or pre-fill fields based on the user's login credentials or other information. System administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Ticket

System administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Live Chat

System administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

User Information

An user information provider can be implemented to automatically pull information from an external database and display the information in the Communication tab of tickets. A business can use this provider to display important customer information (recent purchases, licensing information, number of past tickets, etc.) so that agents have all available details when viewing tickets. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Events

An events provider can be implemented to automatically update third-party software and databases when agents perform specific actions. System administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Log Settings

SmarterTrack creates log files containing information about license activations, SMTP connections, POP connections and errors on a daily basis. The Log Settings section gives system administrators the ability to view and manage these log files.

To access this section, click the settings icon . Then expand the System Settings folder and click Log Settings in the navigation pane. The log settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Delete Log Files After - The number of days after which the log files are deleted. Deleting log files on a regular basis will minimize the amount of disk space that SmarterTrack uses. By default, log files are deleted after 14 days.

- Enabled - Checking this box will delete log files after the specified number of days. By default, this setting is enabled.
- Enable short query logging - Checking this box will allow SmarterTrack to keep a short log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- Enable full query logging - Checking this box will allow SmarterTrack to keep a very detailed log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- Enable lock tracing - Checking this box will allow SmarterTrack to keep a detailed log about objects being cached in server memory. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- Enable cache tracing - Checking this box will track all system level locks to identify points of conflict in the software. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.

View

Use this tab to view or delete log files. The following columns are available:

- Checkbox - Use these boxes to select multiple log files. Log files must be selected before choosing an action from the toolbar.
- File Name - The name of the log file.
- Date - The date the log file was created.
- Size - The size of the log file.

To view a specific log file, simply double-click the file and it will load in a pop-up window. To delete a log file, select the log file(s) to delete and click the Delete button in the content pane toolbar.

Setup

Database Settings

Note: This section is only available to the primary system administrator and users that are assigned the role of database administrator.

Use this section to configure the SmarterTrack installation to connect to an existing database. These settings are configured while running the InstallShield Wizard during the installation proces, but can be modified by the database administrator at any time.

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

- Server Type - To specify the type of server, select the appropriate option from the list.
- Server Name - The name of the server on which the database is stored.
- Authentication - To specify the authentication method, select the appropriate option from the list.
- Domain Name - The domain name used to authenticate with the database.
- Username - The identifier used to authenticate with the database.
- Password - The corresponding password used to authenticate with the database.
- Database Name - The name of the database.
- Table Name Prefix - The text that prefixes each database table in SmarterTrack. Note: SmarterTools recommends leaving the table name prefix as the default value.

The following options are available in the content pane toolbar:

- Save - Saves the database settings.
- Test Settings - Verifies the database connection settings are valid.

Clustering

This feature is only available to system administrators using SmarterTrack Enterprise with Failover Functionality or SmarterTrack Enterprise with Load Balancing Functionality.

System administrators can prevent costly downtime by installing a second server that is always connected to the SmarterTrack database in standby mode. In the event that the primary server fails, the secondary server will operate as a backup so your help desk remains online.

To view the failover settings, click the settings icon . Then expand the System Settings and Setup folders and click Failover in the navigation pane. The failover servers will load in the content pane.

The following columns are available:

- Checkbox - Use these boxes to select multiple servers. Servers must be selected before choosing an action from the toolbar.
- Server Name - The computer name of the server the license key was activated on.
- File Path - The locations of the app_data folder in which the configuration file is stored.
- Last Heartbeat - The date and time the SmarterTrack database last communicated to the server.

- Processes - The number of times the license key has been installed on the server.
- Status - The status of the server.
- Mode - The edition of the SmarterTrack installation on the server.

- Primary - The default server that SmarterTrack uses.
- Disabled - The server is not set up to operate as a backup in the event the primary server fails.
- Active - The server actively communicating with the SmarterTrack database.
- Passive - The server that will act as a backup in the event the primary server fails.
- Unavailable - The server is not communicating with the SmarterTrack database.

The following options are available in the content pane toolbar:

- Enable - Allows the selected server to operate as a backup in the event the primary server fails.

- Disable - Prevents the selected server to operate as a backup in the event the primary server fails.
- Set Active - Changes the status of the selected server to active.
- Delete - Permanently deletes the selected server(s) as a potential failover server.
- Refresh - Refreshes the content pane.

Optimization

System administrators will use this section to fine-tune the performance of SmarterTrack. Note: These are advanced settings and it is not recommended to change them without understanding the impact of the changes.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Optimization in the navigatoin pane. The optimization settings will load in the content pane and the following tabs will be available:

Options

• Heartbeat Interval - The amount of time between communication attempts to the server to refresh tree view counts, reminder popups and counts, live chat popups, and other automatic functions. By default, this option is set to 10 seconds.
• Portal Chat Link Interval - The amount of time between communication attempts to the server to detect whether live chat is online or offline when displaying the chat online/offline image. By default, this option is set to 20 seconds.

• Enabled - Select this checkbox to enable the portal chat link interval. Note: If this options is disabled, portal visitors will have to manually refresh the page to determine if live chat is currently offline or online.
• Live Chat Interval - The amount of time between communication attempts to the server to refresh live chat messages. By default, this option is set to 2 seconds.
• Who's On Interval - The amount of time between communication attempts to the server to refresh visitor information displayed in Who's On. By default, this option is set to 8 seconds.

Threads

Use this tab to start and stop background threads. Changing the status of background threads may disable certain areas of the application and will affect funtionality. For this reason, it is not recommended to change the status of background threads unless instructed to do so by the SmarterTools Support Department for debugging purposes.

Business Hours

System administrators will use this section to specify the organization's business hours and holidays.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Business Hours from the navigation pane. The business hour settings will load in the content pane and the following tabs will be available:

Business Days

Use this tab to specify the days and times the organization operates. To edit a day, select the desired day and click Edit in the content pane toolbar.

Holidays

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

Email Settings

System administrators will use this section to specify how SmarterTrack sends messages from the system and handles error notifications.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Email Settings> in the navigation pane. The email settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following setting:

- Delivery Delay - To specify the number of seconds automated messages from the system are delayed, type the appropriate number in this field. By default, the delivery delay is 10 seconds.
- Addresses to Exclude - To exclude addresses from automatic emails, type the email addresses in this field.

Error Notifications

Use this tab to specify the following error notification settings:

- Reporting Level - To specify how error notifications are recorded, select the appropriate option from the list.
- Email Address - The email address from which error notifications are sent.
- SMTP Server - The outgoing SMTP server name.
- SMTP Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25.
- Enable secure sockets layer (SSL) - Check this box if the connection to the SMTP server must be SSL.
- Enable SMTP authentication - Check this box if SMTP authentication is required to send mail from this email address.
- Auth Username -The identifier used to authenticate with the SMTP server.

• New Password - The corresponding password used to authenticate with the SMTP server.
• Confirm Password - Retype the corresponding password used to authenticate with the SMTP server.

To test the SMTP connection, click Test SMTP in the content pane toolbar. If the settings are invalid, the test will return an error message and the SMTP settings will need to be adjusted.

Email Templates

When certain actions occur within the system, SmarterTrack can send an email based on that action. For example, if a company wants to send a follow-up survey to a customer after a Ticket resolution, the system will automatically send an email requesting the customer complete the survey. These system-generated emails are predefined and no new templates can be created. However, system administrators can use this section to edit the template content.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Email Templates in the navigation pane. A list of email templates will load in the content pane.

The following columns are available:

• Checkbox - Use these boxes to select multiple templates. Email templates must be selected before choosing an action from the toolbar.
• Template Name - The name of the email template.
• Description - A short summary describing the purpose of the template.

The following option is available from the content pane toolbar:

• Edit - Allows the system administrator to edit the subject line and text of an email template.
• Refresh - Refreshes the content pane.

Template Types

There are seven different templates for system emails: Auto-Close Ticket, Email Rejected Due to Lock, Email Rejected Due to New Ticket Requirements, Email Rejected Due to Policy, Forgot Login, Survey, Ticket List, and Verify Email Address.

Ticket List

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

• All Tickets belong to user [%TicketList%]

Auto-Close Ticket

This template is used to notify a customer that the Ticket he/she is replying to is closed and the Ticket will be reopened. The following variables are available:

- The Subject of the closed ticket [%Subject%]
- The ticket number of the closed ticket [%TicketNumber%]

Email Rejected Due to New Ticket Requirements

This template is used to notify customer that an email cannot be sent to the department without creating a ticket. The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Email Rejected Due to Policy

This template is used to notify customer that an email cannot be sent to the department without creating a ticket. The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Verify Email Address

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

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address on the account [%EMAIL%]
- The link they need to click on to verify the account (Required) [%LINK%]
- The username on the account [%USERNAME%]

Forgot Login

This template is used to send the password to the registered email account on file when a user forgets his/her login information. The following variables are available:

- Company name as defined in brand settings [%COMPANY%]
- The base URL of the support site [%SITEURL%]

• The password of the account (required) [%PASSWORD%]
• The username of the account [%USERNAME%]

Email Rejected Due to Lock

This template is used to notify a customer that the ticket has been closed and locked. The following variables are available:

• The current date (on the server) [%DATE%]
• The current date (on the server) [%DATE%]
• The current time (on the server) [%TIME%]
• The email address of the original sender [%EMAIL%]
• The subject of the email that came in [%SUBJECT%]

Survey

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

• The survey URL [%SurveyUrl%]

Organization

Brands

Companies with different divisions may want to use SmarterTrack to manage all company communications. To do this, each division is set up as a different brand in the system. Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface. Departments can also be assigned to support specific brands.

To access this section, click the settings icon . Then expand the System Settings and Organization foldesr and click Brands in the navigation pane. Any brands associated to your company will load in the content pane.

In general, the following columns are available:

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

The following options are available from the content pane toolbar:

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

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

Options

Use this tab to edit the following settings:

- Brand Name - The name of the brand.
- Portal Tab Text - The text that appears on the first portal tab.
- Logo Navigate URL - The company's website URL.
- Company Logo - The company's logo.
- Display logo on portal - Checking this box will display the company logo on the main portal page.

SMTP

Use this tab to edit mail settings for brand-level notifications:

- Email Address - The email address from which brand messages are sent.
- Friendly Name - The name used to identify the mail server. This field is optional.
- SMTP Server - The outgoing SMTP server name.
- SMTP Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25.
- Enable secure sockets layer (SSL) - Check this box if the connection to the SMTP server must be SSL.
- Enable SMTP authentication - Check this box if SMTP authentication is required to send mail from this email address.
- Auth Username - The identifier used to authenticate with the SMTP server.
- New Password - The corresponding password used to authenticate with the SMTP server.
- Confirm Password - Retype the password used to authenticate with the SMTP server.

Host Headers

Host headers allow a Web server to host more than one Web site domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For more information, see the KB article How To - Create Host Headers for Use with Brands . Note: Host headers cannot be edited after the brand is created.

Who's On

Each host header has one or more related URLs—the URL that the visitor sees in the browser's address bar when they are visiting a website. To ensure that visitors to the related URLs are tracked in Who's On, type the URLs in this field.

- Track portal visitors in Who's On - Checking this box will include portal visitors in the Who's On count.

Custom Fields

This tab displays the available custom fields for brand settings. For more information on custom fields, see Field Definitions .

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 section lists all of the departments that are currently available to your organization and provides system administrators with the ability to add new departments and/or edit/delete existing departments.

To access this section, click the settings icon . Then expand the System Settings and Organization folders and click Departments in the navigation pane Any departments associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department Name - The name of the department. For example, sales, support, or billing.
- Email Importing - The POP username.
- Users - The number of users assigned to the department.
- Active Tickets - The number of active tickets within the department.
- Active Live Chats - The number of active live chats within the department.

The following options are available from the content pane toolbar:

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

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

Options

• Department Name - The name of the department.

• Brand Name - The brand associated to the department.

• Front Line Group - The default group to which tickets and live chats are assigned.

• Language - The default language of the department.

• Disable ticket and live chat viewing for employees that are not members of this department - Checking this box will prevent portal visitors from submitting tickets and live chats to the department.

• Enable live chat - Checking this box will allow customers to initiate live chats with members of this department.

• Enable POP ticket importing - Checking this box allows customers to submit tickets by email. Note: The system administrator must also check "Allow new tickets to be submitted through POP" in the POP tab to allow customers to submit new tickets by email.

• Enable auto-responder - Checking this box will send system emails to the customer. For more information, see Email Templates .

Tickets

• Portal Submission Requires - The role required to submit a ticket.

• Ticket Template - The custom field template used to submit tickets. The ticket template specifies which fields the user should complete when submitting a ticket.

• Survey to Offer - To automatically offer a survey to customers after a ticket is closed, select the appropriate survey from the list.

• Auto-Close After - The number of hours after which tickets assigned to the department will automatically close. By default, tickets will auto-close after 168 hours.

• Enabled - Checking this box will enable the auto-close setting. By default, this setting is disabled.

• Auto-Delete After - The number of days after which tickets assigned to the department will automatically be deleted. By default, tickets will be deleted after 365 days.

• Enabled - Checking this box will enable the auto-delete setting. By default, this setting is disabled.

• Auto-Purge Tickets After - The number of days after which deleted tickets within the department will be purged from the system. By default, deleted tickets will be purged after 180 days.

• Enabled - Checking this box will enable the auto-purge deleted tickets setting. By default, this setting is disabled.

• Auto-Purge Spam After - The number of days after which spam tickets within the department will be purged from the system. By default, spam tickets will be purged after 30 days. By default, this setting is enabled.

• Enabled - Checking this box will enable the auto-purge spam tickets setting. By default, this setting is disabled.

• Enable tickets to be started in the portal - Checking this box will allow customers to submit new tickets from the portal. By default, this setting is enabled.

• Require verified email address to start tickets - Checking this box will only allow users with verified emails to submit tickets.

• Send notification to customer when tickets are auto-closed - Checking this box will allow the customer to receive an email notification when a ticket is auto-closed. For more information, see Email Templates .

• Include tickets with resolutions in auto-delete - Checking this box will automatically delete all tickets after the designated period, even if they have resolutions tied to them.

• Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before closing it.

• Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.

• Custom Message Before Ticket Submission - The text that is displayed at the top ticket submission form.

• Custom Message After Ticket Submission - The text that is displayed after a ticket is successfully submitted.

Live Chat

• Live Chat Template - The custom field template used to submit live chats. The live chat template specifies which fields the user should complete when submitting a live chat.

• Estimated Wait Time - The estimated number of seconds that a customer may need to wait to live chat with an agent. By default, the estimated wait time is set to 30 seconds.

• Survey To Offer - To automatically offer a survey to customers after a live chat, select the appropriate survey from the list.

• Display survey immediately upon live chat completion - Checking this box will automatically open a survey in pop-up window after a live chat.

• Custom Message Before Chat - The text that is displayed at the top live chat submission form.

• Custom Message After Chat - The text that is displayed after a live chat has ended.

• Estimated Wait Time Message - A message notifying customers of their wait time to chat with an agent.

• "Next in Queue" Message - A message notifying customers that they are next in queue to chat with an agent.

• No Agents Available Message - A message notifying customers that none of the agents within the department are available to chat.

Call Logs

• Call Log Template - The custom field template used to create a call log. The call log template specifies which fields the agent should complete when logging a call.

• Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.

• Enabled - Checking this box will enable the auto-delete setting. By default, this setting is disabled.

• Auto-Purge After - The number of days after which deleted call logs within the department will be purged from the system.

• Enabled - Checking this box will enable the auto-purge setting. By default, this setting is disabled.

SMTP

Use this tab to specify the following email settings for messages sent from the department:

• Email Address - The email address from which department messages are sent.

• Friendly Name - The nickname of the server. This field is optional.

• Server Name - The outgoing SMTP server name on which the email account resides.

• Server Port - The port used to connect to the SMTP server. By default, the SMTP server port is 25.

• Enable Secure Sockets Layer (SSL) - Check this box if the connection to the SMTP server must be SSL.

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

• Auth Username -The identifier used to authenticate with the SMTP server.

• New Password - The corresponding password used to authenticate with the SMTP server.

• Confirm Password - Retype the password used to authenticate with the SMTP server.

POP

This tab is only available if the "Enable POP Ticket importing" option is enabled in the Options tab.

Note: If using a POP server for email, any messages in the account will be downloaded into SmarterTrack and deleted from the mail server.

• Server Name - The outgoing POP server name on which the email account resides.

• Server Port - The port used to connect to the POP server. By default, the POP server port is 110.

• Enable Secure Sockets Layer (SSL) - Check this box if the connection to the POP server must be SSL.

• Login Username -The identifier used to authenticate with the POP server.

• New Password - The corresponding password used to authenticate with the POP server.

• Confirm Password - Retype the password used to authenticate with the POP server.

• Import Frequency - The number of minutes after which SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.

• Allow new tickets to be submitted through POP - Checking this box will allow customers to submit Tickets by email.

Auto-Responder

This tab is only available if the "Enable auto-responder" option is enabled in the Options tab.

• Max KB Search Results - The maximum number of knowledge base article links included in the text of the auto-responder.

• KB Search Folder - The folders in which the knowledge base articles suggested by the auto-responder are saved.

• View Ticket Online Text - The anchor text of the link to view the ticket in the portal. By default, this link is included in the text of the auto-responder.

• Enabled - Checking this box will include a link allowing the customer to view the ticket in the portal in the text of the auto-responder. Note: If the variable [#VIEWTICKETONLINE#] is not included in the text of the auto-responder, this link will not be available.

• Browse KB Text - By default, the auto-responder displays a link to browse the knowledge base after the list of related articles. System administrators can specify the link text by typing the desired text in this field.

Custom Fields

This tab displays the available custom fields for department settings. For more information on custom fields, see Field Definitions .

Groups

Department are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

To add new groups or edit existing group settings, click the settings icon . Then expand the System Settings and Organization folders and click Groups in the navigation pane. Any groups associated to your company will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
• Group Name - The name of the group.
• Department - The department to which the group belongs.
• Ticket Distribution - The distribution method SmarterTrack uses to assign tickets to agents within the group.
• Users - The number of users assigned to the department.
• Active Tickets - The number of active tickets within the department.
• Active Live Chats - The number of active live chats within the department.

The following options are available in the content pane toolbar:

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

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

Options

• Department - The department to which the group belongs.
• Group Name - The name of the group.
• Ticket Distribution - To specify how SmarterTrack assigns tickets to agents within this group, select the appropriate distribution method from the list.
• Enable page pushing - Checking this box will allow the agent to push relevant website pages to customers via live chat and Who's On. Note: This option is only available to system administrators. Agents must have Who's On enabled to push pages.
• Enable sending of files - Checking this box will allow agents to send files to customers via live chat.

Agents

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

- Agent - The name of the agent.
- Ticket Workload Weight - To specify an agent's ticket workload, select the appropriate weight from the list. The higher the weight, the more tickets the agent will receive.
- Max New Tickets - The maximum number of active tickets for which the agent can be responsible for at a time.
- Auto-Logout - To specify the number of hours after which an inactive agent is automatically logged out of the SmarterTrack system, select the appropriate option from the list. By default, agents are automatically logged out after 30 minutes of inactivity.
- Enable ticket hand-off on auto-logout - Checking this box will automatically hand off any active Tickets for which the agent is responsible to another agent at logout. By default, this setting is disabled.
- Enable administrator alert on auto-logout - Checking this box will send a notification to the system administrator if the agent is automatically logged out due to inactivity. By default, this setting is disabled.
- Enable agents to receive tickets and live chats automatically upon login - Checking this box will automatically make an agent's status active for any live chat or ticket groups they belong to after logging in to the management interface.
- Enable live chat - Checking this box will allow the agent to receive live chats for this group. By default, this setting is enabled.

Time Estimates

This tab gives system administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports.

- Ticket Created - The estimated number of minutes agents will spend creating a new ticket.
- Ticket Transferred - The estimated number of minutes agents will work on a ticket that has been transferred to them.
- Ticket Message In - The estimated number of minutes agents will spend working on a new ticket message.
- Ticket Message Out - The estimated number of minutes agents will spend researching and replying to a ticket message.

• Live Chat Started - The estimated number of minutes agents will spend starting a live chat.
• Live Chat Transferred - The estimated number of minutes agents will chat with a customer that has been transferred to them.
• Live Chat Message In - The estimated number of minutes agents will spend responding to a live chat message.
• Live Chat Message Out - The estimated number of minutes agents will spend composing a live chat message.

Custom Fields

This tab displays the available custom fields for group settings. For more information on custom fields, see Field Definitions .

Employees and Users

To add new employees or edit existing employee settings, click the settings icon . Then expand the System Settings and Organization folders and click Employees in the navigation pane. A list of all the employees in the system will load in the content pane.

To add new users or edit existing user settings, click the settings icon . Then expand the System Settings and Organization folders and click Users in the navigation pane. A list of all the end users in the system will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple employees/users. Employees/users must be selected before choosing an action from the actions toolbar.
• Username - The username the empoyee/user uses to login to SmarterTrack.
• Display Name - The name used to identify the employee/user within the SmarterTrack system.

• Email Address - The agent's email address.
• Verified Email - Indicates whether the user's email address has been verified or not.
• Last Login - The date on which the employee/user last logged in to SmarterTrack.

The following options are available from the actions toolbar:

• New - Creates a new employee/user.
• Edit - Allows the system administrator to make changes to an employee's/user's settings.
• Delete - Permanently deletes the selected employee(s)/user(s). Search - Allows the system administrator to search for an employee or user. --%>
• Refresh - Refreshes the content pane.

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

Options

The following options are available:

- Username - The username used to login to SmarterTrack.
- Authentication - The method used to login to SmarterTrack. The system administrator can choose to allow employees to log in using a password or active directory authentication.
- New Password - To change the login password, type a new password in this field. Note: This option is only available if the authentication method is password.
- Confirm Password - To verify the new password, re-type it in this field. Note: This option is only available if the authentication method is password.
- Authentication Domain - The domain name of the active directory used for authentication of a login username and password.
- Email Address - The employee's/agent's email address.
- Verified - Checking this box confirms that the user's email address is valid and allows the user to view Tickets from the portal.
- Display Name - The name used to identify the employee/user within the SmarterTrack system.
- Skin - To change the look and feel of the management interface, select the appropriate skin from the list.
- Time Zone - To specify the time zone, select the appropriate time zone from the list.
- Avatar - The display picture the agent uses when interacting with customers via Live Chat.
- New Image - To change the avatar, click Browse and select the appropriate file.

Roles

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

Web Interface

The following options are available:

- Items Per Page - To change the total number of items (tickets, chats, etc.) that will display on each page, type the appropriate number in this field. By default, the total number of items per page is set at 14.
- Compose Font - To change the default font type and size for tickets and live chats, select the

appropriate font type and size from the lists. The default font type is Tahoma and the default font size is 10 pt.

• Preview Pane - To specify how the preview pane displays in the management interface, select the appropriate option from the list. By default, the preview pane displays on the right side of the interface. Enable Who's On - Checking this box will give the agent access to Who's On visitor monitoring. By default, this option is enabled. Note: This option is only available to system administrators and agents that have Who's On enabled. If this option is disabled, the Who's On section in the Workspace will not be available to the agent. --%>

• Enable automatic reminder popup - Checking this box will allow the agent to receive new reminders in a pop-up window. By default, this option is enabled.

Tickets

The following options are available:

• Forward To - To specify an alternate email to which tickets are forwarded, type the email address in this field.

• Enabled - Checking this box will allow the agent to forward tickets to an alternate email.

• Allow Replies From - To specify an alternate email address to use when replying to tickets, type the email address in this field.

• Enable waiting ticket counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that are waiting for a customer response. By default, this option is enabled.

• Enable ticket follow-up counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that is marked as needing a follow-up. By default, this option is enabled.

• Include waiting tickets in root tree item counts - Checking this box will include tickets that are waiting for a customer response toward the total number of tickets for which an agent is responsible. By default, this option is disabled.

• Include tickets scheduled for follow-up in root tree item counts - Checking this box will include tickets that are marked as needing a follow-up toward the total number of tickets for which an agent is responsible. By default, this option is disabled.

Live Chat

The following options are available:

• Agent Alias - The alias the agent uses to interact with customers.

• Max Active Live Chats - To change the number of live chats the agent can participate in at a time, type the appropriate number in this field. By default, this option is set to 1. Enable Page

Pushing - Checking this box will allow the agent to push relevant Web site pages to customers via Live Chat and Who's On. Note: This option is only available to system administrators. Agents must have Who's On enabled to push pages. --%>

• Enable automatic live chat popup - Checking this box will display new live chats in a popup window. By default, this option is enabled. Enable From Name on Invitations - Checking this box will include the agent's display name (alias) on new chat invitations. By default, this option is disabled. --%>

• Enable live chat notification sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.

• Enable live chat in queue notification sound - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.

• Welcome Message - To specify a default message that is displayed when a customer first enters a chat, type the message in this field.

• Default Invitation Message - To specify a default message to invite customers to live chat, type the message in this field.

Reporting

Use this tab to specify the following settings for reporting purposes:

• Hourly Cost - The hourly cost for the employee to work with Tickets and Live Chats. This field is used for cost analysis reporting and is set to 10.00 by default. Note: This option is only available to system administrators.

Custom Fields

This tab displays the available custom fields for user preferences. For more information on custom fields, see Field Definitions .

Roles

Every SmarterTrack user is assigned a role, which defines permissions and dictates which features the user has access to. By default, SmarterTrack has seven predefined roles:

• Agent - An employee that has access to the management interface. Typically, an agent is able to view and respond to tickets and live chats; create call logs and follow-up tasks; manage knowledge base articles, news items, and canned replies; use agent chat rooms and agent instant messenger; and view Who's On.

• Manager - An employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view global tickets and live chats. Note: Managers must also have the agent role enabled.

• Database Administrator - An employee that has access to the database information for SmarterTrack. Note: Database administrators must also have the system administrator role enabled.
• System Administrator - An employee that has access to the system settings and the management interface. Typically, a system administrator has access to the entire system and can manage departments, groups, and users. The only area a system administrator cannot access is the database settings.
• Everyone - A customer, website, or portal visitor. Typically, everyone can view and search Knowledge Base articles and news items. Depending on how a company customizes this role's permissions everyone may have the ability to submit tickets and/or live chats.
• Registered User - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items.
• Registered User with Verified Email - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items.

To access this section, click the settings icon . Then expand the System Settings and Organization folders and click Roles in the nagivation pane. A list of roles will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple templates. Email templates must be selected before choosing an action from the actions toolbar.
• Role - The name of the role.
• Role Type - Indicates whether the role relates to company employees or customers (end users).

• Users - The number of SmarterTrack users assigned to the role.
• Custom Role - Indicates whether the role is one of the seven predefined roles or if it was created by the system administrator to meet specific company needs.

The following options are available from the content pane toolbar:

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

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

Options

Use this tab to specify permissions for the role:

- Role Name - The name of the role.
- Role Type - To specify whether the role relates to company employees or end users, select the appropriate option from the list.
- KB Articles - To specify whether users assigned to this role can create, modify, or read Knowledge Base articles, select the appropriate option from the list.
- News - To specify whether users assigned to this role can create, modify, or read news items, select the appropriate option from the list.
- Tickets - To specify whether users assigned to this role can create or reply to Tickets, select the appropriate option from the list.
- Tasks - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Call Logs - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Who's On - To specify whether users assigned to this role can view Who's On visitors, select the appropriate option from the list.
- Reports - To specify whether users assigned to this role can create reports, select the appropriate option from the list.
- Manage Area - To specify whether an employee has supervisory access to the management interface, select the appropriate option from the list. Note: Giving an employee supervisory access will allow the employee to access the Manage section of the management interface.
- Distribution - To specify how much control an employee has over the distribution of his/her workload, select the appropriate option from the list.
- Events - To specify whether users assigned to this role can configure events, select the appropriate option from this list.

KB Articles

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

News

Use this tab to specify news permissions for this role. Note: This tab is only available if the system administrator selects custom news permissions in the options tab.

Tickets

Use this tab to specify ticket permissions for this role. Note: This tab is only available if the system administrator selects custom ticket permissions in the options tab.

Tasks

Use this tab to specify task permissions for this role. Note: This tab is only available if the system administrator selects custom task permissions in the options tab.

Call Logs

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

Who's On

Use this tab to specify Who's On permissions for this role. Note: This tab is only available if the system administrator selects custom Who's On permissions in the options tab.

Reports

Use this tab to specify report permissions for this role. Note: This tab is only available if the system administrator selects custom report permissions in the options tab.

Manage Area

Use this tab to specify report permissions for this role. Note: This tab is only available if the system administrator selects custom manage area permissions in the options tab.

Distribution

Use this tab to specify distribution permissions for this role. Note: This tab is only available if the system administrator selects custom distribution permissions in the options tab.

Events

Use this tab to specify events permissions for this role. Note: This tab is only available if the system administrator selects custom events permissions in the options tab.

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 initate 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 typs 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 foldes 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 foldesr 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.

Tickets

Ticket Settings

To access this section, click the settings icon . Then expand the System Settings and Tickets folders and click Ticket Settings in the navigation pane. The ticket settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- View Ticket Requires - To specify which roles can view tickets, select the appropriate option from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket in Portal Requires - To specify which roles can submit tickets, select the appropriate option from the list. By default, this setting is set to registered users with verified email addresses.
- Max Messages in Replies - The number of previous messages automatically included in the text of a ticket response. By default, ticket replies include the text of three previous messages.
- Stop Idle Events After - The number of days after which idle waiting tickets no longer trigger event actions.
- Ticket Distribution - To specify how tickets are automatically assigned to agents, select the appropriate distribution method from the list. For an explanation of the different distribution methods, see Ticket Distribution Methods .
- Enable custom email footers for employees - Checking this box will allow agents to create a custom signature for ticket responses. If this option is enabled, agents can create their signatures from the My Settings area. By default, this option is disabled.
- Enable specific date selection for follow-ups - Checking this box will allow agents to specify the date the follow-up is due. If this option is disabled, the agent can only choose the number of days that can pass until the follow-up is due. By default, this option is enabled.
- Enable ticket idle time reset when call log is added - Checking this box will set a ticket's idle time to 0 when an agent adds a call log to the ticket. By default, this option is disabled.
- Enable transferring tickets to another instance - Checking this box will allow agents to transfer tickets to another SmarterTrack installation. By default, this option is disabled.

Portal

Use this tab to edit the following settings:

• Max Uploads for New Tickets - The maximum number of attachments that can be uploaded to a new ticket.
• Enable attachments when submitting tickets - Checking this box will allow users to attach files to a ticket submission. By default, this option is enabled.
• Enable CAPTCHA when submitting tickets - Checking this box will require users to submit a CAPTCHA before submitting a new ticket. By default, this option is disabled.
• Enable automatic search of knowledge base when submitting a new ticket - Checking this box will allow SmarterTrack to automatically suggest related knowledge base articles to users that submit tickets through the portal. By default, this option is enabled.
• Display tickets created through email to users in portal - Checking this box will allow customers to see the tickets submitted via the portal interface only. If this option is enabled, customers will not be able to view tickets submitted by email. By default, this option is disabled.
• Display the option to send ticket list by email in portal - Checking this box will prevent users from requesting a list of their tickets via email. By default, this option is disabled.
• Department Selection Text - The text that displays in the portal that instructs the user to select a department when submitting a new ticket.

Email

Use this tab to edit the following settings:

• Email Send Mode - To specify whether emails are sent as HTML or plain text, select the appropriate option from the list. By default, emails are sent in HTML format.
• Default Encoding - To specify the encoding format, select the appropriate option from the list.
• Delete Failed Emails After - The number of days after which undelivered emails are deleted. By default, failed emails are deleted after 30 days. Note: Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder.
• Reply Line Prefix - The punctuation that appears at the beginning of each line of a quoted email in a ticket reply. By default, the reply line prefix is >. Note: This option applies to plain-text emails only.

Raw Content

Use this tab to edit the following settings:

Max Stored Per Email - To specify the amount of raw content storage available for each email, select the appropriate option from the list. --%>
• Purge After - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.

• Purge After - The maximum number of files that will be kept before the files are purged from the system. By default, the maximum number of files is 25,000. Note: SmarterTools recommends keeping this option at the default setting or lower.
• Purge After - The maximum amount of space available for raw content storage. If this amount of space is exceeded, the files are purged from the system. By default, the maximum amount of space is 10,000 MB.

Servers

If the system administrator has enabled the ability to transfer tickets between SmarterTrack installations, this tab is used to specify which instances of SmarterTrack tickets can be transferred to/from.

Signatures

To ensure consistency among all departments and groups within the company, system administrators can create custom signatures that agents will use on all ticket correspondence.

To access this section, click the settings icon . Then expand the System Settings and Tickets folders and click Signatures in the navigation pane. A list of signatures will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple signatures. Signatures must be selected before choosing an action from the toolbar.
• Brand - The brand to which the signature is assigned.
• Department - The department to which the signature is assigned.
• Group - The group to which the signature is assigned.

The following options are available from the content pane toolbar:

• New - Creates a new signature.
• Edit - Allows the system administrator to make changes to a signature's settings.
• Delete - Permanently deletes the selected signature(s).
• Refresh - Refreshes the content pane.

To view a specific signature, simply double-click the signature. The signature will load in a pop-up window and the following options will be available:

• Brand - To assign the signature to a brand, select the appropriate brand from the list.
• Department - To assign the signature to a department, select the appropriate department from the list.
• Group - To assign the signature to a group, select the appropriate group from the list.

Use the WYSIWYG editor and the text box to edit the signature text.

Rebalance Rules

To ensure an even workload is assigned to agents, system administrators can set rebalance rules. Rebalance rules allow the system to automatically redistribute tickets among the available agents based on the parameters set by the system administrator. For example, a support department with two active agents may receive a high volume of tickets that are distributed evenly among both agents. Later that day, a third agent may login and the rebalancing rule can be set to automatically redistribute any unanswered active tickets among all three agents at that time.

To access this section, click the settings icon . Then expand the System Settings and Tickets folders and click Rebalance Rules in the navigation pane. A list of rebalance rule swill load in the content pane.

In general the following columns are available:

- Checkbox - Use these boxes to select multiple rules. Rebalance rules must be selected before choosing an action from the toolbar.
- Group - The group to which the rebalance rule applies.

The following options are available from the content pane toolbar:

- New - Creates a new rule.
- Edit - Allows the system administrator to make changes to the selected rebalance rule.
- Delete - Permanently deletes the selected rule(s).

To view a specific rebalance rule, simply double-click the rule. The rebalance rule will load in the content pane and the following options will be available:

- Rule Name - The name of the rebalance rule.
- Group - The group to which the rebalance rule applies.
- Agents - The agents to which the rebalance rule applies.
- Hold After Compose - The time frame after which a submitted ticket can be reassigned to another agent. By default, this option is set to 30 minutes.
- Hold After Read - The time frame after which a ticket that has been read can be reassigned to another agent. By default, this option is set to 10 minutes.
- Hold After Assigned - The time frame after which a ticket that has been assigned to an agent can be reassigned to another agent. By default, this option is set to 20 minutes.
- Pinned Tickets Can Rebalance After - The time frame after which pinned tickets can be reassigned to another agent. By default, this option is set to 2 hours.

• Enabled - Check this box to reassign pinned tickets to another agent. By default, this setting is disabled.
• Execute on Interval - The time frame after which the rebalancing rule will be applied to tickets in the system. By default, this option is set to 1 hour.

• Enabled - Check this box to reassign tickets at a specific interval.
• Execute on Schedule - The times at which the rebalancing rule is applied to tickets in the system. A maximum of three times per day can be scheduled.

• Enabled - Check this box to reassign tickets at a certain time each day.
• Execute when an agent starts receiving tickets - Check this box to reassign tickets when an agent logs in and actively accepts tickets for this group.
• Execute when an agent stops receiving tickets - Check this box to reassign tickets when an agent logs out of the system and/or stops receiving tickets for this group.

Quality Control

SmarterTrack's quality control feature provides a method for managers to ensure agents provide the required level of service to customers. This feature can be used for training purposes or as part of a company's regular quality control measures.

To access this section, click the settings icon . Then expand the System Settings and Tickets folders and click Quality Control in the nagivation pane. A list of agents for whose ticket responses are monitored will load in the content pane.

To view the quality control settings for a specific agent, simply double-click the agent. The following quality control settings will be available:

• Agent - The agent being monitored.
• Forward To - The email address to which an agent's ticket responses are forwarded.
• Frequency - The number of ticket replies copied to the manager(s). The number of copied replies is based on a ratio in which the formula is 1 ticket for every X replies where X is the number entered in this field. For example, if 5 is entered in the frequency field, 1 out of every 5 tickets will be copied to the manager.

Ticket Distribution Methods

SmarterTrack allows system administrators to choose a default ticket distribution method or vary the distribution methods by group. Note: The following distribution methods apply to new tickets and reassigned existing tickets only. In virtually all cases, if an agent is available for a follow-up response, the ticket is assigned to them to allow for better communication.

For information on setting distribution methods, refer to the KB article How To -- Set Up the Ticket Distribution Method .

Basic Round Robin

Typically, system administrators will choose this method to ensure that everyone gets an equal share of work. For example, a company that has a sales team that works on commission may employ the basic round robin distribution method to ensure that all sales agents receive the same number of potential leads.

System administrators that choose this distribution method should note the following:

- Ticket weights do not take into consideration the number of outstanding tickets an agent may have, but assigns tickets based on an equal load. tickets usually will not be redistributed.
- Tickets transferred do not count as a ticket assigned. The counters only update when new tickets are assigned.
- Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to 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 distribution method is typically chosen for support departments and response-time centered groups. Typically, most front-line groups will use this method because this distribution method focuses on getting a fast response to the customer. As a result, agents that work faster typically get more tickets, so companies that use this method should use reporting to determine each agent's workload.

System administrators that choose this distribution method should note the following:

- 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 agent for whom the most time has passed since a new ticket was assigned.
- Each agent has a "maximum number of open tickets" setting that governs how much work can be in his/her box. Once the max value is reached, the system will not assign new tickets to that agent. If all of the agents are maxxed out, the system will hold the tickets in the queue until space frees up.

Cherry Picking

This model is used by companies that want the absolute fastest response time and are not concerned that agents can see all available tickets. Because this relies on the agents to do their fair share (and not pick the easy tickets, proper agent training is essential for successful implementation of the cherry picking distribution method.

System administrators that choose this distribution method should note the following:

- New tickets are not assigned directly to agents. All tickets are directed to the queue and are grabbed by staff members. (Follow-up tickets are assigned as usual).
- SmarterTools reccommends configuring event notifications that alert agents when tickets have been waiting in the queue too long.

Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on rules set by the system administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

System administrators that choose this distribution method should note the following:

- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see Rebalance Rules .

Live Chats

Live Chat Settings

To access this section, click the settings icon . Then expand the System Settings and Live Chats folders and click Live Chat Settings in the navigation pane. The live chat settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Live Chat Requires - To specify which users live chat, select the appropriate role from the list. By default, this option is set to all users.
- Distribution Method - To specify how live chat are assigned to agents, select the appropriate distribution method from the list. For an explanation of the different distribution methods, see

Live Chat Distribution Methods .

• Hand Off If No Initial Response - The number of minutes after which a live chat is reassigned if there is no response from the original agent.

• Enabled - Check this box to automatically reassign live chat that do not receive an agent response.

• Hand Off If No Follow-up Response - The number of minutes after which a live chat assigned to an inactive agent is reassigned. By default, this option is set to five minutes. Note: An agent is considered to be inactive in a live chat if the agent has not transferred the live chat to another agent, typed in the live chat text box, or does not have the last response in the chat.

• Enabled - Check this box to automatically reassign live chats to another agent if the original agent has not performed an action on the live chat.

• Hand Off If Interface Closed - The number of minutes after which a live chat assigned to an agent that is away is reassigned. By default, this option is set to two minutes.

• Enabled - Check this box to automatically reassign live chats to another agent if the original agent is away (or has closed the management interface).

• Enable Google Translate - Check this box to allow the customer to choose a language to chat in. SmarterTrack will automatically translate the live chat text into the appropriate language for the agent. By default, this option is enabled.

• Enable agent name/alias on invitations - Check this box to display the agent's alias on live chat invitations. By default, this option is disabled.

• Enable files to be sent by users during live chat - Check this box to allow users to send files to agents via live chat. By default, this option is disabled.

• Disable live chat outside of business hours - Check this box to turn off the live chat feature when the company is closed. By default, this option is disabled. Note: System administrators will need to define the live chat hours on the Business Hours page in the Setup folder in System Settings.

• Department Selection Text - The text that displays in the live chat submission form instructing customers to select a department.

Sounds

Use this tab to specify the following settings:

• Chat in Queue - To specify the how often a sound notifies agents that live chats are in the queue, select the appropriate time interval from the list.

• Unanswered Message - To specify the how often a sound notifies agents that they have an unanswered live chat, select the appropriate time interval from the list.

• Idle Warning Threshold - The number of seconds an agent has failed to respond to a live chat message. After this threshold has been reached, the agent will receive a warning notification.
• Idle Warning - To specify the how often a sound notifies agents that an unanswered chat has reached the warning idle threshold, select the appropriate time interval from the list.
• Idle Critical Threshold - The number of seconds an agent has failed to respond to a live chat message. After this threshold has been reached, the agent will receive a critical notification.
• Idle Critical - To specify the how often a sound notifies agents that an unanswered chat has reached the critical idle threshold, select the appropriate time interval from the list.

Live Chat Links

Use this section to add live chat links to the company website. To view a list of live chat links, click the settings icon . Then expand the System Settings and Live Chats folders and click Live Chat Links in the navigation pane. A list of live chat 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 actions toolbar.
• ID - The image identifier that is used in the live chat link script.
• Title - The name of the live chat link.

The following options are available from the content pane toolbar:

• New - Creates a live chat link.
• Edit - Allows the system administrator to make changes to a live chat 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 live chat link settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

• Title - The name used to identify the live chat link.
• Refresh Rate - The number of seconds after which the script checks the SmarterTrack server to confirm the status of live chat. By default, the refresh rate is 30 seconds.
• Enable for sales department - Checking this box will allow customers to initiate live chats with members of this department.
• Enable for billing department - Checking this box will allow customers to initiate live chats with members of this department.

• Live Chat Link Script - The script that the system administrator must insert into the company website HTML to allow customers to initiate live chats from the website. Inserting the script into the website will also display the live chat offline or online image on the website.

Note: If the system administrator has created departments other than those listed above, live chat for these departments can also be enabled from the options tab.

Live Chat Online

Use this tab to edit the following settings:

• Display As - Select how the live chat online notification will be displayed.
• Image Link - The image to be displayed when live chat is available.
• Description - The text displayed when a customer's mouse pointer hovers over the live chat online image.
• Anchor Title - The text available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.
• Navigate URL - The website URL to which customers are directed if they click on the live chat online image.
• CSS Class - The cascading style sheet class used to format the image on the company website. This is an optional field.

Live Chat Offline

Use this tab to edit the following settings:

• Display As - Select how the live chat offline notification will be displayed.
• Image Link - The image to be displayed when live chat is unavailable.
• Description - The text displayed when a customer's mouse pointer hovers over the live chat offline image.
• Anchor Title - The text available to search engine spiders that describes the live chat offline link. Specifying the anchor title may improve SEO efforts.
• Navigate URL - The website URL to which customers are directed if they click on the live chat offline image.
• Navigate Target - The HTML code that specifies whether the URL opens in a new window or the current window. For example, _blank will indicate that the URL should open in a new window. This is an optional field and if left blank will open the URL in a new window by default.
• CSS Class - The cascading style sheet class used to format the image on the company website. This is an optional field.

Live Chat Distribution Methods System administrators can choose between two different distribution methods for live chats.

Cherry Picking

Under the cherry picking distribution method, all live chats are directed to the queue and agents must manually select the live chats to participate in. This model is typically preferred by small companies.

System administrators that choose this distribution method should note the following:

- Live chats are never assigned to agents automatically
- An audible alert will notify agents when a live chat is in the queue.. The basic notification sound can be configured in the same manner as the other chat sounds.
- If there are no agents receiving live chats, the system will treat chat as offline.

Round Robin

Most companies will use this distribution method for live chats because it attempts to give all of the agents an equal percentage of the workload. Under this distribution method, each agent has a maximum number of live chats that he/she can work on at a time. When a new live chat is initiated, the system checks the active agents withhin the live chat group to determine which agents have not met their maximum limit. The live chat is then assigned depending on the number of live chats the agent is working on and the amount of time that has passed since a live chat was last assigned to the agent.

For example, assume a company has three agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to five chats at once. Joe and Bob are relatively new, and can handle one and two simultaneous chats at once. If none of the agents are engaged in a live chat when a new live chat is initiated, the system will perform the following checks to determine which agent will receive the live chat:

- The system will first check to see who has the lowest percentage of capacity.
- The system then checks to see which agents have the lowest number of live chats.
- Finally, the system checks to determine which agent has the earliest Last Chat Ended time.

So in the example above, the agents with the lowest percentage of capacity are Sue, Bob, Joe. All of the agents have the same number of live chats (none), but the most time has passed since Joe participated in a live chat. Therefore, the system will assign the live chat to Joe.

Time Logs

Time Log Categories

System administrators can create categories to organize time logs into related groups. For example, if a system administrator wants to easily track how much time is spent working for a specific customer, he can create a create a category for that customer. Then, whenever an agent creates a time log for an issue concerning that customer, the agent can assign it to the appropriate category.

To access time log categories, click the settings icon . Then expand the System Settings and Time Logs folders and click Time Log Categories in the navigation pane. A list of time log categories will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple time log categories. Time log categories must be selected before choosing an action from the toolbar.
• Category Name - The name of the time log category.
• Description - A short description of the time log category

In general, the following options are available in the content pane toolbar:

• New - Creates a new time log category.
• Edit - Allows the agent to edit an existing time log category.
• Delete - Permanently deletes the selected time log category.
• Refresh - Refreshes the list of time log categories in the content pane.

To view a specific time log category, simply double-click the appropriate time log category. The time log category will load in a popup window and the following fields will be available:

• Category - The name of the time log category.
• Description - A short description of the time log category.

Who's On

Who's On Settings

To access this section, click the settings icon . Then expand the System Settings and Who's On folders and click Who's On Settings from in the navigation pane. The Who's On settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

• Purge Idle Users - The amount of time after which idle visitors can be purged from Who's On tracking. By default, this option is set to 15 minutes.
• Purge Removed Users - The amount of time after which idle visitors can be purged from Who's On tracking. By default, this option is set to 2 minutes.
• Purge Pending Users - The amount of time after which idle visitors can be purged from Who's On tracking. By default, this option is set to 5 minutes.
• Invitation Ignored After - The amount of time after which an ignored live chat invitation disappears from the visitor's screen. By default, this option is set to 2 minutes.
• Virtual Page for Script - The page that can be used to summarize the contents of the actual page the visitor is viewing. For example, if the Web page URL is lengthy, the system administrator may want to create a virtual page with a shorter identifier.
• Tracking Script - The JavaScript that must be placed on the website pages that Who's On will monitor. Note: System administrators can incorporate custom variables in the tracking script to collect additional information on website visitors. For more information, refer to the KB article How To - Use Custom Variables in Who's On Tracking Scripts .

Invitation

Use this tab to edit the following settings:

• Horizontal Alignment -To specify the horizontal alignment of the live chat invitation on the customer's browser window, select the appropriate option from the list.
• Horizontal Offset - The number of pixels by which the live chat invitation is offset from the horizontal alignment.
• Vertical Alignment - To specify the vertical alignment of the live chat invitation on the customer's browser window, select the appropriate option from the list.
• Vertical Offset - The number of pixels by which the live chat invitation is offset from the vertical alignment.
• Enable absolute page position on invitations - Checking this box will display the live chat invitation according to the offset and alignments specified. If this option is enabled, SmarterTrack will not take into account the position of the user's scroll bar when issuing the live chat invite.

Page History

Use this tab to edit the following settings:

• Total Page Limit - The maximum number of website pages displayed on a visitor's page history in Who's On. By default, this option is set to 1,000.
• First Viewable Pages - The number of website pages the visitor initially viewed. By default, this option is set to display the first 50 pages the visitor viewed.
• Last Viewable Pages - The number of website pages the visitor last viewed. By default, this option is set to display the last 50 pages the visitor viewed.
• Display only first and last viewable pages in history - Checking this box will only display the first and last viewable pages in the visitor's Who's On page history. If this option is enabled, any other pages visited will not display in the page history. By default, this option is disabled.

Who's On Filters

With Who's On filters, system administrators and agents have the ability to segregate website and/or portal visitors into groups based on the pages they are viewing.

To access Who's On filters, click the settings icon . Then expand the System Settings and Who's On folders and click Who's On Filters in the navigation pane. A list of Who's On filters will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple filters. Who's On filters must be selected before choosing an action from the toolbar.
• Filter Name - The name of the filter.
• Brand Filter - The brand to which the filter is assigned.
• Conditions - The Who's On column by which the visitors should be grouped.
• Filter Enabled - Indicates whether or not the filter is enabled.

The following options are available from the actions toolbar:

• New - Creates a Who's On filter
• Edit - Allows the system administrator to make changes to a filter's settings.
• Delete - Permanently deletes the selected filter(s).
• Search - Allows the system administrator to search for a specific filter.

To view the settings for a filter, simply double-click the filter. The filter settings will load in the content pane and the following tabs will be available:

Filter

Use this tab to edit the following settings:

• Filter Name - The name of the filter.
• Brand Filter - The brand to which the filter is assigned.
• Enable Filter - Checking this box will allow visitors to be grouped using this filter.

Conditions

Use this tab to specify how this filter will group visitors (by browser, city, hits, etc.). When viewing this tab, the following options are available from the actions toolbar:

• Save - Allows the system administrator to save changes made to a filter's settings.
• Add Condition - Allows the system administrator to add filter criteria.
• Edit - Allows the system administrator to make changes to filter criteria.
• Delete - Permanently deletes the selected condition(s).

Broadcast Messages

A broadcast is a system-wide announcement that can be distributed to a select group of agents, users, or portal visitors. For example, companies might use a broadcast message to inform employees and customers of a planned Web site outage or to remind employees of a meeting.

To access this section, click the settings icon . Then expand the System Settings and Who's On folder and click Broadcast Messages in the navigation pane. A list of broadcast messages will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple messages. Broadcast messages must be selected before choosing an action from the toolbar.
• Broadcast Name - The name of the broadcast message.
• Brand - The brand to which the broadcast message applies.
• Recipients - Indicates which types of users will receive the message.
• Filters - The Who's On filter to which the broadcast message applies.

The following options are available from the actions toolbar:

• New - Creates a new broadcast message.
• Edit - Allows the system administrator to make changes to a broadcast message.
• Delete - Permanently deletes the selected message(s).
• Send - Sends the selected message(s).

To view the settings for a broadcast message, simply double-click the message. The message settings will load in the content pane and the following fields will be available:

• Broadcast Name - The name of the broadcast message.
• Recipients - To specify the recipients of the message, choose the appropriate option from the list.
• Message - The text of the broadcast message.

Globalization

Supported Languages

With support for nearly 60 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Setting up language support for SmarterTrack is a multi-step process. For detailed instructions, please refer to the KB article How To -- Set Up SmarterTrack to Support Multiple Languages . Use the Supported Languages section to create language support for translatable strings. For more information, see Translatable Strings .

To access the Supported Languages section, click the settings icon . Then expand the System Settings and Globalization folders and click Supported Languages in the navigation pane. A list of currently supported languages will load in the content pane.

The following columns are available:

• Checkbox - Use these boxes to select multiple languages. Languages must be selected before choosing an action from the toolbar.
• Language - The language name and dialect, if available.
• Locale - The language and the geographic location in which the language or dialect is used.
• Default - Indicates if the selected language is the default language.
• Enabled - Indicates whether support for the selected language has been enabled.
• Language Pack Exists - Indicates whether the language pack has been installed into SmarterTrack.

The following options are available from the actions toolbar:

• New - Allows the system administrator to designate a new supported language.
• Edit - Allows the system administrator to make changes to a supported language's settings.
• Delete - Permanently deletes the selected supported language(s).

To edit the settings for a specific language, simply double-click the language. The supported language details will load in the content window.

Translatable Strings

Some phrases and words may not be available for translation through a specific language pack. When this happens, system administrators can use translatable strings to define these phrases and words. For example, a U.S. company with customers in Spain may create a translatable string to translate the company's department names (billing, sales, etc.) into Spanish (ventas, facturacion, etc.)

To access the Translatable Strings section, click the settings icon . Then expand the System Settings and Globalization folders and click Translatable Strings in the nagivation pane. A list of translatable strings will load in the content pane.

The following columns are available:

- Translatable Strings - Use these boxes to select multiple languages. Languages must be selected before choosing an action from the toolbar.
- Token Name - The identifier for the translatable string. Note: Token names must begin and end with @@.
- Description - A summary describing the purpose of the translatable string.
- Status - Indicates whether the translatable string can be translated into the supported languages.

The following options are available from the content pane toolbar:

- New - Allows the system administrator to designate a new supported language.
- Edit - Allows the system administrator to make changes to a supported language's settings.
- Delete - Permanently deletes the selected supported language(s).

To edit the settings for a specific translatable string, simply double-click the translatable string. The translatable string settings will load in the content window and the fields for the supported languages will be available in addition to the following fields:

- Token Name - The identifier for the translatable string.
- Description - A summary describing the purpose of the translatable string.
- Fields for the supported languages.

Custom Fields

Field Definitions

Some companies may want to gather information that is not normally recorded in SmarterTrack. To do this, system administrators can create an unlimited number of custom fields. Custom fields can be used to define the additional information a company may need and can be applied to tickets, live chats, advanced searches, reports, and system settings.

Use the Field Definitions section to create a new custom field. To view a list of custom fields currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields folders and click Field Definitions in the navigation pane. A list of custom fields will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple field definitions. Custom field definitions must be selected before choosing an action from the toolbar.
• Field Identifier - The name of the custom field.
• Data Type - The format in which the custom field data is provided.
• Organizational - Indicates whether the custom field can be applied to system settings.

The following options are available from the content pane toolbar:

• New - Creates a custom field.
• Edit - Allows the system administrator to make changes to a custome field's settings.
• Delete - Permanently deletes the selected custom field.

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

• Field Identifier - The name of the custom field.
• Data Type - To specify the data type, select the appropriate option from the list.
• Organizational (applies to users, groups, etc.) - Checking this box will allow the system administrator to use the custom field in conjunction with system settings.
• Default Value - The default contents of the custom field. This field is optional, and is often left blank. However, it can provide useful in certain circumstances. For example, a company may want to create a custom field that allows customers to opt in or out of promotional emails. To encourage customers to opt in, the system administrator may configure the default value to indicate that the customer is willing to receive promotional emails.

Search Definitions

Note: This is an advanced feature that will change the submission process for tickets and live chats.

Search definitions are used to create a custom submission process for tickets and live chats. In general, search definitions work by connecting to an external database and searching to see if any results match the query. For example, a company may configure a department to only accept live chats from customers with an invitation code. The field in which the customer enters the invitation code is the search definition. When the customer submits the code, SmarterTrack will execute the query by connecting with the external database storing the code to see if the code is valid. If the system determines the code is valid, the customer will be allowed to initiate the live chat.

To view a list of search definitions currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields folders and click Search Definitions in the navigation pane. A list of search defintions will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select search definitions. Search definitions must be selected before choosing an action from the toolbar.
- Display Name - The name of the search field.
- Query Type - The type of database to which SmarterTrack connects to execute the query.

The following options are available from the actions toolbar:

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

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

Query

Use this tab to edit the following settings:

- Display Name - The name of the search field.
- Query Type - The type of database to which SmarterTrack connects to execute the query.
- Connection String - The code that defines how the system connects to the external database.
- SQL Query - The script that the search definition executes.

Inputs

Use this tab to edit the following settings:

- Display Name - The text displayed to customer describing the custom field.
- Parameter Name - The variable that is used in the query to define the value of the custom field.

- Password Field - Checking this box will mask the text that the customer types into the custom field.

Outputs

This tab displays existing field definitions in the SmarterTrack system. These fields are optional, and if they are left blank, the system will use the default values assigned to the field definitions.

Templates

Some companies may want to gather information that is not normally recorded in SmarterTrack. Custom fields can be used to define the additional information a company may need and can be applied to tickets, live chats, advanced searches, reports, and system settings.

Templates are used to define which custom fields are available to customers through tickets and live chats. To view a list of templates currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields folders and click Templates in the navigation pane. A list of templates will load in the content pane.

The following options are available from the cpmtemt [ame toolbar:

- New - Creates a new template.
- Edit - Allows the system administrator to make changes to a template.
- Delete - Permanently deletes the selected search template(s).

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

Options

Use this tab to edit the following setting:

- Display Name - The name of the template.

Field Definitions

Use this tab to add existing field definitions to this template. For more information, see the Field Definitions section of the online help. When adding or editing field definitions to a template, the following options are available:

- Custom Field - The custom field to be added to the template.
- Display Name - The text displayed to customer describing the custom field.
- Visibility - To specify whether the field definition is available to users, agents, or both, choose the appropriate option from the list.
- Required by users - Checking this box will make require users to complete this custom field.
- Required for agent ticket responses - Checking this box will require agents to complete this

custom field before sending a ticket response.

• Required for agents to close tickets - Checking this box will require agents to complete this custom field before closing a ticket.

Search Definitions

Use this tab to add existing search defintions to this template. For more information, see the Search Definitions section of the online help.

Activation

Licensing

To access view licensing information for SmarterTrack, click the settings icon . Then expand the System Settings and Activation folders and click Licensing in the navigation pane. The edition, version, and license level information for the version of SmarterTrack currently being used will load in the content pane.

he following options are available from the actions toolbar:

• Activate Key - Activates a new SmarterTrack license key.

• Reactivate Key - Reactivates a SmarterTrack license key.

• Details - Displays details about the license, including feature, status, expiration, limits and available trials.

• Buy Now - Allows the system administrator to purchase a new license key.

SmarterTrack Self Diagnostic

Use the SmarterTrack Self Diagnostic to test your SmarterTrackserver for errors. To access this feature, click the settings icon . Then expand the System Settings and Activation folders and click Self Diagnostic in the navigation pane. SmarterTrack will perform a test and display the results in a popup window.

SMARTERTOOLS END USER LICENSE AGREEMENT

SmarterTools, Inc. Software License Terms

This End User License Agreement ("EULA") is between SmarterTools, Inc. ("SmarterTools") and the License holder ("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 and Your rights under this License. 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 shall apply to:

* This Software

* Future Versions of this Software

* Updates, add-ons, and plug-ins 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, but not limited to, "Professional," "Enterprise", and "Free" editions of the Software, and maximum allowed numbers of users, profiles, devices, email addresses domains, web sites, or agents ("level");

* 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:

* "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.

* "Effective Date" shall be the date upon which this EULA was accepted by You.

* "Elastic Computing" shall refer to a user's ability to install software, create websites or instantiate a database on one or more Workers that can then be given incremental CPU cycles or percentages, memory (RAM) allocations, and/or physical disk space and bandwidth allocations that can all, then, be managed (increased or decreased) separately and on an as needed basis.

* "Failover" is the ability of a system to automatically switch to a second, standby system should the primary system fail or is temporarily shut down.

* "License" shall refer to the revocable, non-exclusive, non-transferable license to use the Software ("License") in accordance with the terms and conditions of this EULA. The term License applies to purchased and non-purchased Licenses, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable and/or activate the software or certain Features Selection(s) in the Software (collectively, "License Keys").

* "License Key" shall apply to the alphanumeric combination entered/applied upon installation and used to access Feature Selections. License Keys are delivered to the owners of purchased (paid for) Licenses and to those who may receive authorized promotional or trial Licenses, if applicable (pursuant to this EULA). SmarterTools may create and provide certain Levels, Editions, and/or Versions of the Software that do not require entry or use of a License Key for promotional or other purposes. This EULA remains in full force and effect whether or not a License Key is required or provided by SmarterTools.

* "Load Balancing" is a networking methodology whereby processing and workload is distributed evenly among a group of independent machines (e.g., servers) so that no single device is overwhelmed and so that there is no single point of failure.

"Multi-tenancy" and "Multi-tenant license(s)" shall refer to the ability of any single license to support multiple separate and unique client organizations, particularly when offering a single license in a Software as a Service (SaaS) capacity. For the purposes of this EULA, only SmarterStats and SmarterMail are multi-tenant licenses.

* "Periodic License" shall be a License with a defined temporal component (start and end date) whether or not such License is subject to renewal, automatically renews, effectively terminates, or is extended (e.g., Monthly/Lease Licenses, Trial Licenses, Development Licenses). Periodic Licenses may be governed by additional terms and conditions in a separate written agreement.

* "Third Party Providers" shall be any other software, application, plug-in, add-on, utility, tool, device, or methodology by any individual, group, organization, affiliation, company, or other entity that connects, modifies, links, and/or integrates to/with the Software for any purpose whatsoever.

* "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.

* "Worker(s)" shall be the location where software, websites or databases are installed in an Elastic Computing environment. A Worker can then have CPU cycles, disk space and RAM allocations and bandwidth modified (i.e., increased or decreased) on an as needed basis to accommodate shifts in traffic and usage. Also known as a worker process.

1. License.

A. Grant of License.

Upon the the Effective Date, 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.

This License is subject to any restrictions SmarterTools, in its sole discretion, may impose in this EULA or imposed as a condition of purchase, including but not limited to the particular Features Selection You chose at the time of purchase. Updates and Features Selection are subject to the terms and conditions of this EULA, or any other end user license agreement provided with such Update or Features Selection at the time of receipt or purchase, which shall supersede this EULA.

This License to use the Software is conditioned upon You paying all related charges and fees imposed by SmarterTools for purchase of the Software, monthly-license of the Software, or for the authorized delivery of the Software as a service (SaaS). 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 on any single personal computer or server; one instance of a Virtual Private Server; or in the case of Elastic Computing, on any single Worker for Your own use or use by Your Customer(s) pursuant to the terms of section 1.C. below. Should SmarterTools designate that a specific license can be used for Failover, then You may install that license on a second machine that matches the exact specifications of the initial installation machine, and use that second machine as a Hot Standby. Should SmarterTools designate that a license can be used for Load Balancing, then You may install that license on as many similarly-configured machines as necessary to meet any Load Balancing requirements.

C. Sublicense, Resale, Lease, Sub-lease ,or Transfer

You may sublicense this License to a third party(ies) ("Customer") only pursuant to a Shared Hosting agreement and the terms and conditions of this EULA, if applicable. You represent and warrant that each Customer has accepted this EULA prior to allowing the Customer access to or utilization of the Software and You shall promptly provide confirmation of each Customer(s)'s acceptance of the EULA upon request by SmarterTools. You shall indemnify, defend, and hold SmarterTools harmless against any claims asserted by or against You by any of Your Customer(s) or by any third party related to Your Customer(s)'s use of the Software, including but not limited to claims of infringement of the intellectual property rights of any third party and the additional warrantee, liability, and indemnification provisions found in Sections 3 and 5.

Certain authorized parties ("SmarterTools Authorized Reseller") may Resell, Lease, Sub-lease, or Transfer this License (collectively, "Transfer") to any third party subject and pursuant to a separate authorizing agreement in writing with SmarterTools (e.g., Master Partner Agreement). For the purposes of this EULA, Transfer shall refer to any transaction whereby sole use, management, ownership, and/or control of the software is assigned to any third-party for that party's benefit, pursuant to the terms and conditions of this EULA, whether or not a fee or other compensation is charged and whether or not such Transfer is permanent or temporary. Transfers by or between any party(ies) other than SmarterTools or a SmarterTools Authorized Reseller must be approved by SmarterTools in advance and in writing.

You may install and maintain the Software on behalf of a third party; however, all SmarterTools Licenses in such circumstances must be purchased by the third party directly through SmarterTools or through a SmarterTools Authorized Reseller and the Software must be activated under the name of the related third party; thereby, the related third party assumes full ownership of the License subject to the terms and conditions of this EULA.

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, capacity, 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/migrate 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, Elastic Computing Worker 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 the related License Key and/or access to the Software at any time 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 and/or disable 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, 12, and 13 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, support, 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, any errant or substantial mistranslation of language or information, and/or for any damages arising from events listed in Section 5 of this EULA.

C. Third Party Providers and Web Services

The Software is designed to integrate and/or to be used in conjunction with Third Party Providers through Web services. SmarterTools assumes no liability and makes no warranty or guarantee regarding the applicability of effectiveness of this Software when used in conjunction with these products or whether or not such integration or use might interfere with the operation therein. You agree to hold SmarterTools harmless in all matters resulting from the integration or use with Third Party Providers.

D. 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, or 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.A., 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 de-installation 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 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. 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 law's 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 disablement at the sole discretion of SmarterTools.

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 not be removed, remain visible to the naked eye, free from any clutter or similar color scheme, and can be displayed in any font type or style but shall be displayed in no smaller than 8-point font.

10. Transmission of Information and Communication.

At purchase of the Software and at other times during the term of this EULA You will be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g. credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

From time to time SmarterTools may contact You at any address, including any email address(es), You have provided to SmarterTools regarding the Software, available Updates or Features Selection for the Software, or for promotional purposes. You hereby expressly consent to such communications. If you do not wish to receive further notices, you may notify SmarterTools of your preferences.

From time to time the Software may cause computers, servers, and/or other electronic devices on which You install and operate this Software to use the internet or other means to exchange data with computers, servers, or other electronic devices owned by SmarterTools in order to maintain licenses, communicate updates or instructions, track the location and install base of the Software, gauge performance, enforce SmarterTools' rights with regard to licensing and this EULA, or other information as is needed to properly maintain, protect, or update the Software. Acceptance of this Agreement indicates Your acceptance of this communication and Your assumption of the incumbent risks associated with such communication. Any attempt to prevent, preclude, disrupt, or modify this communication is not allowed under this EULA and may result in the disablement of the Software and license key.

11. Third-party Correspondence, Interaction, Purchase, Service, or Promotion

During use of the Software, You may enter into correspondence with, purchase goods and/or services from, or participate in promotions of third party advertisers or sponsors displaying goods and/or services through the Software. Any such activity, and any terms, conditions, warranties, or representations associated with such activity, is solely between You and the applicable third party. SmarterTools shall have no liability, obligation, or responsibility for any such correspondence, interaction, purchase, service or promotion between You and any such third-party including, but not limited to, translations, mapping, sharing, or any other service or transfer, even if such third-party correspondence, interaction, purchase, service, or promotion is listed as a benefit or feature of the Software. SmarterTools explicitly disclaims any liability, obligation or responsibility for the continuation, viability, quality, reliability, or availability of any such third party provided correspondence, interaction, purchase, service, or promotion.

SmarterTools does not endorse any sites on the Internet that are linked through the Software. SmarterTools provides these links to You only as a matter of convenience, and in no event shall SmarterTools or its licensors be responsible for any content, products, or other materials on or available from such sites. SmarterTools provides the Software to You pursuant to the terms and conditions of this Agreement. You recognize, however, that certain third-party providers of ancillary software, hardware, or services may require Your agreement to additional or different licenses agreements or other terms prior to Your use of or access to such software, hardware, or services.

In all events, conditions, and circumstances the provisions and limitations of Sections 3, 5, and 7 shall apply.

12. 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.

13. 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.

Rev. 20120524

All materials copyright SmarterTools Inc.