



My Settings

Help Documentation

My Settings

Preferences

To edit your personal settings in SmarterTrack, click the settings icon , then expand My Settings and click Preferences in the navigation pane. Your 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 that is used to login to SmarterTrack
- Authentication - The method used to login to SmarterTrack. The administrator can choose to allow users to log in using a standard password, authenticate against active directory or by using an external provider that integrates your log in with an external, third-party product like a CRM or control panel.
- Authentication Domain - When Active Directory authentication is used, this is the domain name used for the authentication of your login username and password.
- Email Address - The agent's email address.
- Display Name - The friendly name used to identify the agent within the SmarterTrack system.
- Time Zone - To specify the time zone, select the appropriate time zone from the list. While the default time zone is set by the administrator, agents can adjust their time zone based on their location. This is helpful for those companies that have customer service agents working in different geographic locations.
- 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 from your local machine.

Roles

This tab displays the roles assigned to you. An user's permissions are defined by their roles, which are assigned by a SmarterTrack administrator. For more information, see Roles . Note: Users cannot edit the roles to which they have been assigned. Only an administrator can change a user's role .

Web Interface

Use this tab to edit the following settings:

- Spell-Check Dictionary - Agents have the ability to select the default spell-check dictionary to use for tickets and live chats. By default, SmarterTrack includes dictionaries for over 15

different languages.

- 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 - There are times when agents want to reply to tickets from an email client or from within webmail. Adding a "forward to" address means that any ticket that is assigned to the agent will be forwarded to this email address.
- Enabled - Checking this box will allow tickets to be forwarded to an agent's email address. This should be disabled if the agent will use the SmarterTrack management interface for replying to tickets.
- Allow Replies From - To specify an alternate email address to use when replying to tickets, type the email address in this field.
- Display 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.
- Display 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 - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact with customers.
- 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 automatic live chat popup - Checking this box will display new live chats in a popup

window. By default, this option is enabled.

- 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.

VOIP

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator. Up to 4 different phone numbers can be added for any given agent.

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 administrators.

Custom Fields

This tab displays the available custom fields for user preferences. For more information on custom fields, see Field Definitions .

Notification Profiles

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events, and deliver the messages to 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, 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 or email.

To view a list of current notification profiles, click the settings icon . Then expand 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.

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.

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.
- **Enabled** - Checking this box will enable email notifications.
- **SMS Email Addresses** - The mobile device email address to which notifications are sent.
- **Enabled** - 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](#) .