System Settings

Help Documentation

System Settings

General Settings

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 for cost calculation reports, 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. More often than not, this time zone should match your current location. However, it can be adjusted to account for offices in other geographic locations.
- Default Skin - Select which skin SmarterTrack will use as the default skin from the list.
- Color Scheme - Select the color scheme SmarterTrack will use as the default for the portal and management interface.
- Allow employees to override default skin - Checking this box will allow agents to override the default skin.

Colors

Use this tab to modify the default color schemes for various parts of the SmarterTrack management interface . Note: For information on customizing the color scheme for the customer-facing portal for your brands, see the section on Brand settings . The color options are:

- Primary Color: - This is the background color for the title bars as well as the number badges that denote the number of items across the management interface. (E.g., the number of tickets). The default is #055E8A.

- Secondary Color: - This is the background color for the button bar in the content and navigation panes. (E.g., New, Actions). The default is #222222.
- Link Color: - This is the color for any links, headers and numeric indicators that appear in the content and navigation panes. (E.g, column headers). The default is #0088CC.

To revert a color back to its default, you can either re-type the default color code as listed above, or simply delete the custom code and save your changes. When a color field is left blank, SmarterTrack will simply revert the field back to its default.

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. For more information on chat rooms see the Chat Rooms page.
- 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. For more information on chat rooms see the Instant Messenger Overview page.
- Enable simultaneous login to the portal and management interface - Checking this box will allow employees to log in to both the portal and management interface at the same time. By default, this setting is disabled.
- Enable confirmation when an agent is the last to go inactive for a group/department - Checking this box will display a confirmation box to the last agent to log out of a department or group letting them know, and havign them acknowledge, that they are the last agent to log out.

Call Logs

Use this tab to enable the following features when using SmarterTrack Communicator:

- Purge recordings After - This settings allow you to automatically purge recorded phone calls after a certain number of days or after reaching a certain storage limit. This helps save disk space on the SmarterTrack server. By default, this is set to 30 days. Note: This setting will only affect agents using SmarterTrack Communicator as it automatically records calls.
- Purce Recordings After - This setting will automatically purge recorded calls after they reach a certain size. By default this is set to 2000MB (2GB). Note: This setting will only affect agents using SmarterTrack Communicator as it automatically records calls.
- Enable personal calls - Checking this box allows agents to make persoanl calls from SmarterTrack Communicator.

Files

Use this to specify the types of files that can be uploaded to SmarterTrack.

- Allowed extensions for document uploads in HTML editor (one per line) - These are the file types that agents can attach to tickets. In general, agents should be able to attach any file type to a ticket. To allow this, simply add an asterisk (*). However, there may be times when administrators will want to limit file attachments to simply images or documents. To restrict agents to specific file types, add the extensions here, one per line, and include the dot. (I.e., .JPG not simply JPG)
- Allowed extensions for end user file uploads (one per line) - These are the file types that customers and end users can upload to agents when submitting tickets from the portal. In general, it's a good idea to limit customers from uploading file types that may prove harmful, such as program files. To restrict end users and allow only specific file types, add the extensions here, one per line, and include the dot. (I.e., .JPG not simply JPG)

Custom CSS

SmarterTrack allows administrators to stylize their portal and/or the management interface with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them.

To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can then create a version of that style yourself, and them paste it in the box to override the default. Realize this will happen wherever that style is used, so changing one style can affect both the portal and the management interface.

To revert back to the default style, simply remove your custom style from here and save your changes.

Security

Use this tab to enable various password requirements for registered users. These settings give administrators greater control over the initial level of security for their systems and helpdesks.

Enable password reset - When checked, this setting allows agents, managers and administrators to reset their passwords from the management interface login screen. Clicking the link and filling out the username and CAPTCHA will send an email with a password reset link to the email address associated with the username. Note: If using external providers or active directory authentication, this feature should not be enabled.

Enable brute force protection - When checked, this setting enables SmarterTrack's brute force protection. Therefore, if a "user" attempts to log in to SmarterTrack more than 10 times in 5 minutes they are locked out for 5 minutes. After 5 minutes they are able to attempt additional log ins.

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 .

External Providers

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. For each external provider enabled, the corresponding tab will become active:

- Enable login provider - Checking this box will enable the login provider and allow the 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 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 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 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 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 administrator to configure the settings on the corresponding external provider tab.

Login

A login provider can be implemented that allows SmarterTrack to query existing 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. 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 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 administrator to add or pre-fill fields based on the user's login credentials or other information. 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

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

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

The 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. 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 administrators the ability to view and manage these log files.

To access this section, click the settings icon . Then expand System Settings then expand Setup 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. A number will appear on the View tab that displays the total number of log files that are available to view.

Setup

Database Settings

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. For example, if the SmarterTrack database is moved from one server to another, these settings should be changed on this page to reflect the move and reconnect to the database.

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 - When using Windows authentication, 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 created for 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 - Verifies that the database connection settings are valid.

Clustering

This feature is only available to administrators using SmarterTrack Enterprise with Failover Functionality or SmarterTrack Enterprise with Load Balancing Functionality.

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 Clustering 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.

• 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.
• Mode - The edition of the SmarterTrack installation on the server.

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

Administrators will use this section to fine-tune the performance of SmarterTrack. By default, SmarterTrack is set to run optimally on the majority of systems, regardless of how busy the help desk is. However, there may come times when system administrators want to manage these settings and customize 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.

• Enable - 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. A number appears in the tab itself to show the total number of threads availble to manage.

Business Hours

Administrators will use this section to specify the organization's business hours and holidays. Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see General Settings .

To access this section, click the settings icon . Then expand System Settings and then Setup 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. Each tab will have number to display the total number of days and/or holidays available to manage.

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.

To remove a day from your business hours, simply select the day of the week and click Edit . When editing the day, delete the start and end times and save your changes. This will unselect that day and remove it from the brand's available business hours.

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.

Master Categories

Configured by the system administrator, master categories are available on time logs and tasks to help managers see where an agent’s time is spent or to organize tasks related to a specific project.

To access this section, click the settings icon . Then expand System Settings and then Setup and click Master Categories from the navigation pane. Any existing master categories will load in the content pane.

Adding New Master Categories

Creating new master categories is very simple, just click New in the content pane toolbar and a Category modal window pops up. Type in the new master category name and click OK to save it. Once created, master categories are availble to use immediately.

Surveys Overview

This feature is only available to administrators using SmarterTrack Enterprise.

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 view or manage surveys in the system, click the settings icon . Then expand System Settings and Setup and click Surveys in the navigation pane. A list of 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.

Keeping track of the number of surveys completed versus the number offered can give insight into how successful a particular survey is received. If a low percentage of surveys are answered, it may be worthwhile to revisit the survey and make adjustments to try and gain a higher percentage of responses.

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

- • New - Creates a new survey.
- • Delete - Permanently deletes the selected surveys and any associated survey results.

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.

Creating New Surveys

To create a new survey, 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).

Email Settings

Administrators will use this section to specify the email settings SmarterTrack will use to send messages and error notifications from the system. Note: These seettings are separate from Department and Groups SMTP settings and only affect system error notifications.

To access this section, click the settings icon . Then expand System Settings and Setup 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. Setting a delivery delay can keep the connection between your help desk and your mail server running smoothly.
• Addresses to Exclude - Any email address you add to this text box will be excluded from receiving any departmental auto-responders (e.g., ticket received notifications).

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 - Error notifications are both sent from this address and sent to this address.
- 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, administrators can use this section to edit the template content.

To access this section, click the settings icon . Then expand System Settings and Setup 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 administrator to edit the subject line and text of an email template.
- Refresh - Refreshes the content pane.

Template Types

There are eight 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.

Auto-Close Ticket

This email is used when a department is set to automatically close tickets after a certain amount of time. The email notifies the customer that a particular ticket was closed, but that the ticket can be re-opened by simply replying to it. The following variables are available:

- The Subject of the closed ticket [%Subject%]
- The ticket number of the closed ticket [%TicketNumber%]

Email Rejected Due to Lock

This template is used to notify a customer that the ticket they are replying to has been closed and locked and offers a way to initiate a new 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 New Ticket Requirements

This template is used to notify a customer that they don't meet the department's required role for starting a ticket. For example, a billing department may require users to be Registered Users of SmarterTrack, but they are attempting to submit the ticket anonymously. For more information, see SmarterTrack Roles . 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 a customer that the department they're trying to contact does not accept tickets via email. This email will be sent when "Allow new tickets to be submitted" is not checked in a department's POP settings. Instead, tickets need to be created via the Web portal. For more information, see Departments . 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%]

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 and they click on the "Fogot Login?" link on the Web portal. 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%]

Survey

This template is used to offer a survey to a customer after their ticket is resolved. The following variable is available:

- The customer name [%CustomerName%]
- The username for the customer [%CustomerUsername%]
- The subject of the resolved ticket [%Subject%]
- The survey URL [%SurveyUrl%]
- The ticket number [%TicketNumber%]

Ticket List

This template is used when a customer requests an emailed list of all previous tickets. The following variable is available:

- All Tickets that belong to user [%TicketList%]

Verify Email Address

This template is used to confirm a new user's email address. The following variables are available:

- The brand name for the help desk they are registering for [%BrandName%]
- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]

- The email address on the account [%EMAIL%]
- The full name for the user signing up [%FullName%]
- The link they need to click on to verify the account (Required) [%LINK%]
- The username on the account [%USERNAME%]

VoIP Accounts

This feature is only available to administrators using SmarterTrack Enterprise and the SmarterTrack Communicator add-on.

Administrators are able to add VoIP accounts directly into SmarterTrack, which means that all settings, profiles and agent information can be pushed to any desktop or laptop an agent logs into. This greatly increases an agent's flexibility and also limits the amount of management and adminstration needed. VoIP accounts are only compatible with SmarterTrack Communicator.

To view or manage VoIP accounts in the system, click the settings icon . Then expand System Settings and Setup and click VoIP Accounts in the navigation pane. A list of accounts 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.
- Agent - The name of the agent.
- Group - The group the agent is assigned to.
- Phone Number - The phone number assoicated with the agent.

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

- New - Creates a new VoIP account.
- Edit - Click this button and select the appropriate account to edit.
- Delete - Permanently deletes the selected account.

Creating a New VoIP Account

To create a new VoIP account, click New in the content pane toolbar. This will open the VoIP account editor, which can be used to create the new account. Options Tab

This tab allows the administrator to specify basic information regarding the account. The available options are:

- Agent - The agent the VoIP account is being created for.
- Group - The group the agent belongs to.

• Country Code - The country code associated with the phone number.
• Phone Number - The agent's phone number. A direct line is not required.
• Extension - The agent's extension.
• Max Phone Lines - The maximum number of phone lines the agent will have available.
• Min Call Log Length - The minimum amount of time a call needs to last before a call log is automatically created. SIP Tab

As SmarterTrack Communicator is a SIP-compliant softphone, a phone server's SIP information is required for each VoIP account that is created. In most cases, this informaiton can be taken directly from the phone server itself.

• VOIP Username - The agent's VoIP username as it appears in the phone server.
• VOIP Password - The agent's password as it appears in the phone server.
• SIP Server - The phone server's SIP address (e.g., sip.ringcentral.com).
• SIP Port - The listening port used for SIP. The default is 5060.
• SIP Domain - The full domain for the SIP phone server (e.g., sip.ringcentral.com:5090)
• SIP Auth Name - The username the phone server assigns to the agent.
• Outbound Proxy Server - The address of the outbound proxy server, if one is being used.
• Outbound Proxy Port - The port used by the outbound proxy server.
• Use Session Description Protocol (SDP) - Check this box in order for the phone server to pass session information to SmarterTrack Communicator. For example, session announcements or session invitations. STUN Tab

Simple Traversal of UDP through NATs (STUN) is a protocol for assisting phone servers that are behind NAT firewalls and/or routers.

• STUN Server - The STUN server's address (e.g., stun.ringcentral.com).
• STUN Port - The STUN server's port. The default is 3478.

Organization

Brands

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

SmarterTrack. In addition, agents can work with customers in each brand separately, and customers of each brand can access customized and brand-specific Web portals.

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 System Settings and Organization 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 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.
- Brand Website - The URL to the primary website for the brand.
- Portal Tab Text - The text that appears on the first portal tab. By default, this says "Portal" but it can be modified to say whatever you like.
- Brand Logo - The logo to use for the brand.
- Display logo on portal - Checking this box will display the company logo on the main portal page.
- 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.

Colors

Use this tab to modify the default color schemes for various parts of the SmarterTrack management interface for this particular brand. The color options are:

• Primary Color: - This is the background color for the title bars as well as the number badges that denote the number of items across the management interface. (E.g., the number of tickets). The default is #055E8A.
• Secondary Color: - This is the background color for the button bar in the content and navigation panes. (E.g., New, Actions). The default is #222222.
• Link Color: - This is the color for any links, headers and numeric indicators that appear in the content and navigation panes. (E.g, column headers). The default is #0088CC.

Announcement

Use this tab to display an announcement on the portal home page. For example, some companies may choose to write a welcome message or a description of the types of services customers might find on the self-service portal. The announcement will appear at the very top of the main content area of the portal.

SMTP

As SmarterTrack does not utilize an internal SMTP server to send emails messages, use this tab to edit mail settings for brand-level notifications. For example, any system emails in any Email Templates .

• From Address - The email address from which brand messages are sent.
• From Display Name - The name used to identify the mail server. This field is optional.
• SMTP Server - The outgoing SMTP server name.
• SMTP Security - Select the level of security used for sending emails, either SSL, TLS or None.
• SMTP Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• 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.
• Password - The corresponding password used to authenticate with the SMTP server.
• Confirm Password - Retype the password used to authenticate with the SMTP server.

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.

Maps

Use this tab to specify the following map settings:

- Map Provider - Select which map provider SmarterTrack will use from the list. Microsoft Bing Maps is the default map provider.
- Enabled - 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 .

Custom CSS

SmarterTrack allows administrators to stylize their brand portals and/or the management interface with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them.

To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can then create a version of that style yourself, and then paste it in the box to override the default. Realize this will happen wherever that style is used, so changing one style can affect both the portal and the management interface.

To revert back to the default style, simply remove your custom style from here and save your changes.

Departments

Brands are broken down into departments. Typically, each department will have its own email address, such as: support@example.com or sales@example.com. This section lists all of the departments that are currently available to your organization and provides administrators with the ability to add new departments 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, billing, etc.
• Email Importing - The POP username being used to import tickets into SmarterTrack for the department.
• Agents - The number of agents assigned to the department.
• Active Tickets - The number of active tickets within the department.
• Active Live Chats - The number of active live chats within the department.

The following options are available from the content pane toolbar:

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

To view the settings for a specific department, simply double-click the department. Alternatively, you can select a department and click the Edit button. 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 to associate to the department.
• Front Line Group - The default group that gets assigned tickets and live chats.
• Language - The default language for the department.
• Enable live chat - Checking this box will allow customers to initiate live chats with members of this department.
• Enable ticket importing from POP - Checking this box allows customers to submit tickets to the department by email. If this option remains unchecked then customers can only submit tickets via the customer portal. Note: The 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 via the porta. For more information, see Roles .
- Ticket Template - The custom field template used to submit tickets. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Templates .
- Survey to Offer - To automatically offer a survey to customers after a ticket is closed, select the appropriate survey from the list. For more information, see Surveys .
- Auto-Close After - The number of hours after which a ticket assigned to the department and marked as "waiting" will automatically close. The default setting is 168 hours.

- Enabled - Checking this box will enable the auto-close setting. By default, this setting is disabled.
- Auto-Lock After - The number of hours after which tickets assigned to the department and marked as "closed" will automatically lock. (Locked tickets do not automatically re-opened when a customer sends a reply.) The default setting is 322 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 with a "closed" or "closed and locked" status will automatically be deleted. The default setting is 365 days.

- Enabled - Checking this box will enable the auto-delete 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.
- Enable automatic search of knowledge base articles when submitting a new ticket - Checking this means that when customers submit tickets to the department via the Web portal, prior to the ticket actually being submitted the end user will be presented with a screen listing possible KB articles that are relevant to their questions. 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 via the Web portal.
- Send notification to customer when tickets are auto-closed - Checking this box sends an email notification to the customer when a ticket is auto-closed. For more information, see 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. Ticket resolutions

are included in SmarterTrack's indexing and available as options in Get Assistance for tickets. Therefore, it may be worthwhile to leave this setting disabled.

• Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before they are able to close it.

• Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.

• Custom Message Before Ticket Submission - The text that is displayed at the top of the ticket submission form in the Web portal.

• Custom Message After Ticket Submission - The text that is displayed after a ticket is successfully submitted from the Web portal.

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. For more information, see Templates .

• 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. For more information, see Surveys . Surveys are displayed immediately after a chat ends.

• Enable chats to be started in the portal - Checking this box will allow customers to start live chats with agents from the portal. By default, this setting is enabled.

• Enable automatic search of knowledge base articles when submitting a live chat - Checking this means that when customers initiate live chats to a department via the Web portal, prior to the chat actually being submitted, the end user will be presented with a screen listing possible KB articles that are relevant to their questions. By default, this setting is enabled.

• Custom Message Before Chat - The text that is displayed at the top live chat submission form.

• Welcome Message - The text that is displayed as the initial message from the agent to the end user. The welcome message appears above the user's initial live chat question.

• 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 estimated wait time to chat with an agent.

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. For more information, see Templates .

• 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.

• 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:

• From Address - The email address from which department messages are sent.
• From Display Name - The nickname of the server. This field is optional.
• SMTP Server - The outgoing SMTP server name on which the email account resides.
• SMTP Security - Select the level of security used for sending emails, either SSL, TLS or None.
• SMTP Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• 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.
• 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.
• POP Security - Select the level of security used for receiving emails via POP3, either SSL, TLS or None.
• Server Port - The port used to connect to the POP server. By default, the POP server port is 110. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• Login Username -The identifier used to log in to the POP server.

- Password - The corresponding password used to log in to the POP server.
- Confirm Password - Retype the password used to authenticate with the POP server.
- Import Frequency - The interval, in minutes, that SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.
- Allow new tickets to be submitted through email - Checking this box will allow customers to submit tickets to the department via email. Note: If "Enable ticket importing from POP" is enabled in the Options tab, but this checkbox remains unchecked, users submitting tickets via email will receive the "Email Rejected Due to Policy" email template rather than the standard department auto-responder. For more information, see Email Templates .
- Leave messages on server - By default, when you retrieve email through POP3, the emails are deleted from the mail server. Enabling this will leave email messages retrieved via POP to stay on the mail server.

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 SmarterTrack will search in before creating the list of suggested articles.
- 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. Administrators can specify the link text by typing the desired text in this field.

Note: SmarterTrack will only send a maximum of 3 responses to any single email address per 30 minute period. This is to keep SmarterTrack from accidentally spamming individual email addresses or possibly getting into looping issues with improperly configured vacation messages or other external auto-responders. SmarterTrack simply stops sending after sending 3 times. Messages do not sit in the outgoing spool and wait to be sent.

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.

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.
• Round Robin - Whether tickets are distributed automatically via round robin distribution or if they're manually taken from the queue. For an explanation of the two distribution methods, see Ticket Distribution Methods .
• Agents - The number of agents assigned to the group.
• Active Tickets - The number of active tickets within the group.
• Active Live Chats - The number of active live chats within the group.

The following options are available in the content pane toolbar:

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

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

Options

• Department - The department to which the group belongs.
• Group Name - The name givent to the group.
• VOIP Extension - If there is an extension for the group as a whole, it should be entered here.
• Allow agents to push pages to customers for live chats - Checking this box will allow the agent to push links to relevant website pages to customers via live chat and Who's On. Note:

This option is only available to administrators. Agents must have Who's On enabled to push pages.
• Allow agents to send files to customers for live chats - Checking this box will allow agents to transfer files to customers via live chat.

Agents

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

• Agent - Select the agent to add to the group from this drop-down list.
• Round Robin - If round robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Round robin options include:

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

• Max Tickets - The maximum number of new, active tickets an agent can have at a time. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.
• Auto-Logout - 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 if the agent is automatically logged out due to inactivity. By default, this setting is disabled.
• Enable administrator alert on auto-logout - Checking this box will send a notification to the 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/available for any live chat or ticket groups they belong to after logging in to the management interface. If unchecked, agents will need to manually set their active groups.
• 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 administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports. For a very basic example, knowing that an agent will take an average of 10 minutes working on a new ticket tells you that an agent should be able to get through 6 tickets an hour. In an 8 hour shift, that means 48 tickets total. When coupled with agent cost, that number tells you what your support costs would be for that agent for that number of tickets. Managers and business owners can then use that information when making decisions on the types of support to offer (live chat, tickets or both), whether to offer paid or free support, whether to increase costs of goods and/or services to account for support costs, etc. In addition, these estimates can be used to project when a department and/or group is at the point where another agent or two is required in order to handle the workload.

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

• Live Chat Outgoing Message - The estimated number of minutes agents will spend composing a live chat message.

Employees and End Users

Just as the names imply, Employees, also known as agents, are employees of a company that are placed in various groups within various departments and handle customer issues using SmarterTrack. End users, also known as customers, are people who use SmarterTrack to submit the issues, questions and comments that agents work on.

To add new employees or edit existing employee settings, click the settings icon . Then expand System Settings and Organization 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 end users or edit existing end user settings, click the settings icon . Then expand System Settings and Organization and click Users in the navigation pane. Alternately, end users can be added using SmarterTrack's extensive web services and/or when SmarterTrack is integrated with a third-party application like a control pane, account management system or more. A list of all the end users in the system will load in the content pane.

By default, 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 toolbar.
• User - The username the employee/end user uses to login to SmarterTrack.
• Email Address - The employee's/end user's email address.
• Role - Indicates whether the account is assigned an end user, administrator or agent role. For more information, see Role .
• Verified Email - A yes/no indication of whether the user's email address has been verified.
• Last Login - The date on which the employee/end user last logged in to SmarterTrack.

The following options are available from the actions toolbar:

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

To view the settings for a specific employee/end user, simply double-click the employee/end user. The employee/end 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 administrator can choose to allow employees to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
• Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
• New Password - 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.
• Email Address - The employee's/end user's email address.
• Display Name - The name used to identify the employee/end user within the SmarterTrack system.
• 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:

• Spell-Check Dictionary - Agents and users 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

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.
• 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

The following options are available:

• Agent Alias - There are times when agents and/or users 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 their real name when they participate in live chats.
• Max Active Live Chats - To change the number of live chats that can be participated in at a time, type the appropriate number in this field. By default, this option is set to 1.
• 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.
• Block live chats while composing call logs - For agents only, checking this box will block live chats from popping up while an active agent is composing a call log.

VOIP

Use this tab to add up to four separate phone numbers for individual agents. For users, this will be their primary phone number.

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

• Everyone - Typically a customer or portal visitor. The Everyone role can view and search Knowledge Base articles, rate KB articles and view news items. The Everyone role is assigned to every user within SmarterTrack and cannot be removed.
• Agent - Typically, an employee that has access to the management interface and that will interact with customers and end users. An agent is able to view and respond to their own tickets and live chats; create their own call logs and follow-up tasks; manage knowledge base articles, news items, and canned replies; use agent chat rooms and agent instant messenger; and view Who's On. It's worth noting that employees with the Agent role can only interact with their own items - they do not have access to other agent's tickets, live chats, etc. In addition, agents are only able to receive tickets for groups that they are members of.
• Manager - Generally an employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view all tickets and live chats, for all agents, for the groups that the manager participates in as well as for any departments those groups are associated with. Just as with an agent, a manager must be a part of a group before they can view all tickets and live chats for all other agents in that group. Note: Managers

must also have the agent role enabled.
• Administrator - An administrator that has access to the system settings, management interface and database information. Typically, an administrator can also manage departments, groups, and users. Note: For new installations, the administrator must also have the agent role enabled. For those upgrading from a previous version, the administrator will not have the agent role enabled and can only access the reports and settings areas of the management interface. Administrators must have the Agent role and be part of groups in order to view global tickets and live chats.
• Registered User - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items.
• Registered User with Verified Email - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items.

To access this section, click the settings icon . Then expand System Settings and Organization 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 administrator to meet specific company needs.

The following options are available from the content pane toolbar:

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

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

Options

Use this tab to specify permissions for the role:

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

KB Articles

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

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

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

KB Feedback

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

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

News

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

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

Tickets

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

Tasks

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

- Create tasks
- Modify tasks

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

Call Logs

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

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

Who's On

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

Reports

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

Distribution

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

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

Events

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

Portal

Portal Settings

To access the portal settings, click the settings icon , then expand System Settings and Portal 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.
- Display news items - Checking this box displays news items in the portal as a its own, separate section. Note: Administrators using RSS may want to leave this unchecked and instead add News items to their RSS feeds.
- 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 phone number - Checking this box will allow users to change their phone number 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.

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

Knowledge Base

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

Options

Use this tab to edit the following settings:

• Default Page - The default page that displays when a user visits the knowledge base. By default, the Search the Knowledge Base page is selected.
• Items Stale After - The number of days after which articles become stale. Stale articles are still available in the portal, but should probably be reviewed and reset. By default, articles are stale after 90 days.
• Popular Articles - The number of days used to calculate the popularity of knowledge base articles. By default, the portal displays the most popular articles for the last 90 days.
• Enable feedback - Checking this box will allow portal visitors to add feedback and comment on knowledge base articles.
• Enable Ratings - Checking this box will allow portal visitors to rate the usefulness of an article on a scale of one to five stars.

Feedback

Use this tab to edit the following settings:

• Initial Comments to Load - The number of comments displayed by default when a knowledge base article loads in the portal.
• Require email address to leave feedback - Checking this box will require portal visitors to provide a valid email address in order to comment on an article.
• Enable CAPTCHA when submitting feedback - Checking this box will require portal visitors

to complete a CAPTCHA to submit feedback on an article.

- Enable feedback moderation - Clicking this button will allow agents and administrators to moderate article feedback before they are publicly displayed on the portal.
- IP Blacklist - Type the IP of portal visitors that should be prevented from commenting on articles.

Note: Companies will need to evaluate their needs to determine whether or not to place restrictions on a portal visitor's ability to leave feedback on an article. In most cases, requiring an email address and/or CAPTCHA will decrease the likelihood of comments from spammers or bots. Moderating comments can also prevent abuse of the system by spammers and can allow companies to ensure comments remain relevant.

Translations

SmarterTrack can automatically translate knowledge base articles via Microsoft Translator or Google Translate. Because both Microsoft and Google charge a fee for their translation service, SmarterTrack will track how many characters and requests your server has attempted to translate to aid you in managing your translation subscription costs. Note: Both services limit their translations to 4,500 characters at a time, so articles longer than this cannot be translated.

Use this tab to edit the translation settings. When a translation method is selected, three additonal buttons will appear in the content pane toolbar:

- Obtain a Key - Allows you to obtain an API key for the chosen provider.
- Test Settings - Once the method is selected and the API key is filled out, you can test the settings to make sure they are correct.
- Reset Count - Resets the character counts for items translated.

Depending on which translation provider is selected, the following options will be available:

- Auto Translation Method - Select which translation service to use from the list. If this option is enabled, SmarterTrack will use the selected translation service to automatically translate knowledge base articles into the language selected by the portal visitor. By default, the auto-translation method is set to none.
- API Key - For Google Translate only. The API key provided by Google. For more information on obtaining this key, see How To Create Knowledge Base Articles in Multiple Languages .
- Client ID - For Microsoft Translator only . An identifier used to represent your SmarterTrack installation. You will create the Client ID when you register your SmarterTrack installation with the Microsoft Azure Marketplace.
- Client Secret - For Microsoft Translator only . A security key that allows Microsoft Translate

to interact with your SmarterTrack installation. For more information on obtaining this key, see How To Create Knowledge Base Articles in Multiple Languages .

Custom Links

In order to create a sense of community with end users, companies may want to expand their Web portals and use them as hubs for disseminating news and information. One way to do this is to add custom links on their portal to other websites and resources. For example, link to a blog, to a community forum, to a management interface and more.

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 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, 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 various 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 System Settings and Tickets 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 role is required to view tickets in the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket in Portal Requires - To specify which role is required to submit tickets from the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket From Email Requires - To specify which role is required to be able to submit tickets via email, select it from the list. By default, this setting is set to all users.
- 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. All replies to tickets are stored by SmarterTrack, but not all replies necessarily need to be included in each ticket response.
- Stop Idle Events After - Idle events run on tickets that sit, without activity, for a certain amount of time. However, idle events can tax SmarterTrack if there isn't an upper limit set that stops from firing after a certain amount of time, especially if more than one idle event set. Therefore, this sets the number of days after which idle waiting tickets no longer trigger event actions.
- Agent Transfer Selection To specify whether an agent can select a specific agent when transferring tickets, select the appropriate option from the list.
- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- Enable specific date selection for follow-ups - Checking this box will allow agents to specify the date a 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, specifically affecting any idle events set on

those tickets. Tickets can go idle for any one of a number of reasons. For example, an agent replies to the ticket and is waiting for the user to reply. However, if that user calls in, a call log can be attached to the idle ticket, thereby resetting its idle time and keeping any idle events from firing until a later time. By default, this option is disabled.

• Enable transferring tickets to inactive agents - Checking this box will allow agents to transfer tickets to agents that are not actively receiving tickets. By default, this option is enabled.

• Enable transferring tickets to another instance - Checking this box will allow agents to transfer tickets to another SmarterTrack installation. This is useful for larger companies that have multiple geographic locations, each with its own SmarterTrack installation. By default, this option is disabled.

• Enable ticket response time report data to be calculated based on business hours - Checking this box will allow any response time reporting to use a department's business hours as the basis for calculations versus a full 24 hour period. That enables managers and administrators to get a better idea of how agents are performing during the business day.

• Display user comment on ticket - Agents can make comments about particular accounts or users that carry over to new tickets coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a ticket from that customer sees the comment and can act accordingly.

• Disable end users' ability to close tickets - Checking this box will remove an end user's ability to close tickets on their own. Instead, they can only be closed by an agent or manager. This ensures agents are aware that the issue is resolved satisfactorily.

• Enable duplicate email check when importing tickets - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.

Service Quality

Service quality settings are a good way to set up service levels for departments. For example, if tickets need to be replied to within a given amount of time, or if there is a limit set on how long a ticket remains open before it's resolved.

• Idle Warning After - The number of seconds an agent has not responded to a ticket. After this threshold has been reached, the agent will receive a warning notification.

• Idle Critical After - The number of seconds an agent has not responded to a ticket before the ticket becomes critical. After this threshold has been reached, the agent will receive a critical notification.

• Duration Warning After - The number of minutes, hours or days a ticket remains open before its duration sets off a warning.

• Duration Critical After - The number of minutes, hours or days a ticket remains open before its duration sets off a critical alert.

Portal

Use this tab to edit the following settings:

- Max Uploads for New Tickets - The maximum number of attachments that can be uploaded with a new ticket. By default, SmarterTrack limits new tickets to 3 attachments.
- Enable attachments when submitting tickets - Checking this box will allow users to attach files to a ticket submission. By default, this option is enabled. The types of files allowed to be uploaded are managed in General Settings .
- 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.
- Display tickets created through email to users in portal - Checking this box will allow customers to see the tickets they have submitted through email within the Web portal. If this option is disabled, customers will not be able to view tickets submitted by email in the portal. By default, this option is enabled.
- Display the option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.
- 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:

- 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:

- 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 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. Note: Both installations must be running the same version of SmarterTrack in order for this feature to work properly.

Signatures

To ensure consistency among all departments and groups within the company, administrators can create custom signatures that agents will use on all ticket correspondence. Alternately, different signatures can be created for each group and/or each department, as the needs arise.

To access this section, click the settings icon . Then expand System Settings and Tickets 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 administrator to make changes to a signature's settings.
- Delete - Permanently deletes the selected signature(s).

Creating and Editing Signatures

To create a new signature, simply click New from the content pane. A new signature window will load in a pop-up window and the following options will be available:

- Brand - To assign the signature to a specific brand, select it from the list.
- Department - To assign the signature to a specific department, select it from the list.
- Group - To assign the signature to a specific group, select it from the list.

When creating new signatures, the WYSIWIG editor can be used to set font types, set colors, add links and more. In addition, variables can be used to pull information from the system to customize the signature based upon how users, department, groups, etc. are set up. The following variables are available:

- Agent Avatar [#agentavatar#] - The avatar information for each employee.
- Current Brand [#companyname#] - The brand that the agent is part of.
- Department Name [#departmentname#] - The department the agent belongs to.
- Display Name [#userdisplayname#] - The "friendly" name of the agent.
- Email Address [#useremail] - The email address of the agent.
- Username [#username#] - The username assigned to the agent.

To view a specific signature, simply double-click the signature. The signature will load in a pop-up window and the same editing options are available as when a new signature is created.

Including Custom Images

Signatures can also include custom images, such as agent photos, icons and logos, apart from the agent avatar. To include a custom image, simply use the standard <img src= > HTML tag and link to an image hosted on your own server or some other hosting service such as Picasa or Flickr. One thing to note: images should be sized and placed so that they do not interfere with the other pieces of an agent's signature.

Rebalance Rules

To ensure an even workload is assigned to agents, 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 administrator. For example, a support department with two active agents may receive a high volume of tickets that are 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.

NOTE: Rebalance rules are NOT meant to be a way to redistribute tickets on an hourly basis. Instead, they are intended to run twice or three times a day. For example, rebalancing tickets during shift changes or for periodic redistribution if agents are taken out of the rotation. In addition, any tickets that have been viewed by agents either by opening the ticket in a new window or by previewing the ticket in the preview pane, and therefore "held" by those agents, as well as any pinned tickets, are NOT redistributed when the rebalance rules take effect.

To access this section, click the settings icon . Then expand System Settings and Tickets 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 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.
- Rebalance Pinned 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 to ensure agents provide the required level of service to customers by allowing managers to review ticket responses as the response is sent to the customer. A practical use for this feature is when it is combined with a structured training program for new agents. Managers can review a high percentage of responses by new agents to ensure that the new agent is replying to the entire issue rather than a select subset of issues, that the spelling and grammar used are up to company standards and more. Of course, quality control can just as easily be used as part of a company's regular quality control measures. More seasoned agents may not require the same oversight as trainees, but oversight can still be administered to ensure the highest levels of customer service possible.

To access this section, click the settings icon . Then expand System Settings and Tickets 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

There are two distribution methods for tickets: the default distribution and Round Robin distribution. Next, ticket distribution is set up at the group level, when adding agents to the Group Settings . Administrators select whether agents will participate in the distribution method, and whether they are part of the primary or secondary distribution group.

For information on setting distribution methods, refer to the KB article How To Set Up the Ticket Distribution Method .

Default Distribution

Also known as "cherry picking," under the default distribution method, all tickets are directed to the queue and agents must manually select the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. In addition, 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.

Administrators that choose this distribution method should note the following:

- When agents are added to a group, in order for them to cherry pick tickets, the agent's round robin option should be "Not Included (Pull from Queue)". This will add the agent to the group so that they can see tickets, take transfers and pull tickets from the group's queue, they just won't receive any new tickets automatically.
- New tickets are not assigned directly to agents. All tickets are directed to the queue and are grabbed by staff members. (Waiting and follow-up tickets are assigned as usual).
- It's recommended that managers or system administrators configure event notifications that alert agents and/or managers when tickets have been waiting in the queue too long.

Round Robin

If administrators want to have more control over how tickets are distributed and to whom, using a round robin distribution method by enabling assignment groups is the answer. 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. Another example is a technical support group that consists of both veteran agents as well as new or "in training" agents. In this case, administrators would want to make sure the more senior agents receive more tickets than the newer agent,s so when the group is set up and the agents are added, the more senior agents receive a high "max tickets" setting and are put in the primary round robin group whereas newer agents are given a lower max tickets number and added to the secondary group. In that way, the senior agents get all new tickets first, with the newer agents acting as the overflow.

Administrators that choose this distribution method should note the following:

- In order for the round robin distribution method to be used, at least one agent needs to have an assignment group, either primary or secondary.
- An agent is considered in receipt of a new ticket in the following cases. In each case, the ticket is counted against any Max Ticket settings for the agent:

- An active ticket is created as an incoming or outgoing ticket and assigned directly or indirectly to him.
- A ticket is transferred from a different user to him, and it's active.

- A new ticket is created through email or web services and is assigned to the agent.
- An existing ticket is replied to through email and it is assigned to the agent but it was assigned to someone different before.
- A ticket is created through web services and is set as active.
- 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.
- When adding agents to a group, it IS possible to exclude specific agents from the round robin distribution. For example, managers may want to be part of a group but not received any tickets. In this case, simply set the round robin distribution for the agent to "Not Incluced (excluded from round robin)" when the agent is added to the group, or edit the agent as needed.
- It IS possible for agents in the secondary round robin group to be the first to receive tickets. This will occur if agents in the secondary group log in before agents in the primary group. For this reason, it's advisable that primary group agents log in first OR that agents in the secondary group have a managed ticket load using max ticket settings.

A Note on Round Robin, Agent Workload and Assignment Groups

When adding agents to a group, it's possible to set the number of max new tickets that the agent can have open at any one time in addition to the assignment group that the agent belongs to. If you set Max Tickets for all agents, regardless of their assignment group, once the max tickets limit for all agents is reached, any tickets that come into the group will go into the queue will not distribute completely; the queue will only distribute as fast as the agents work. If it is important for the queue to be empty, you will want to avoid setting a Max Tickets limit for agents and NOT let them go inactive, again, regardless of their assignment group. Removing max ticket limits will provide the most balanced distribution across a 24 hour period. The Max Tickets setting represents how many NEW tickets are distributed and sitting in the agent's active list. That means that while follow-ups and waiting tickets that become active for an agent (e.g., a reply to a waiting ticket comes in) do not follow max ticket limit, they DO affect agents receiving new tickets. This is important because it allows new work to be evenly distributed but continues to let agents to manage their existing workload.

On the other hand, for new employees, agents-in-training or in circumstances where agents log out at the end of a shift or the end of the day, it may be worthwhile to add a max tickets limit while allowing all other agents in the group to grab the remaining workload.

Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on rules set by the administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

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 System Settings and Live Chats 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 role is required to use live chat, select it from the list. By default, this option is set to all users.
- Hand Off If No Initial Response - When a live chat comes in, but an agent doesn't respond for this amount of time, the chat will either be handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue.

- Enable - Check this box to automatically reassign live chat that do not receive an agent response.
- Hand Off If No Follow-up Response - If, in the middle of a chat, the agent doesn't reply to the end user within this amount of time, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. 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.

- Enable - 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 - If, in the middle of a chat, the agent closes the chat window, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. By default, this option is set to two minutes.

• Enable - Check this box to automatically reassign live chats to another agent if the original agent is away (or has closed the management interface).
• Distribute chats via Round Robin - Checking this box will specify whether SmarterTrack assigns chats to agents within this group automatically. For more information on the different methods, see Ticket Distribution Methods .
• 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.
• Display user comment on live chat - Agents can make comments about an particluar account or user that carry over to new chats coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a live chat from that customer sees the comment and can act accordingly.
• Disable live chat outside of business hours - Check this box to turn off the live chat feature outside of the business hours that were set up for the department. By default, this option is disabled. Note: Administrators will need to define the live chat hours on the Business Hours page in the Setup folder in System Settings.
• Show live chat number at the beginning of a live chat - Check this box to automatically display the live chat ID number at the beginning of each live chat session.
• Department Selection Text - The text that displays in the live chat submission form instructing customers to select the department they want to interact with.

Service Quality

Use this tab to specify the following settings:

• In Queue Sound - To specify the how often a sound notifies agents that live chats are in the queue, select the appropriate time interval from the list.
• Idle Sound - 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 After - The number of seconds an agent has not responded to a live chat message. After this threshold has been reached, the agent will receive a warning notification.
• Idle Warning Sound - To specify the how often a sound warns agents that they have an unanswered live chat, select the appropriate time interval from the list.
• Idle Critical After - The number of seconds an agent has not responded to a live chat message before the chat becomes critical. After this threshold has been reached, the agent will receive a critical notification.
• Idle Critical Sound - 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.

• Duration Warning After - The number of seconds a chat lasts before its duration sets off a warning.

• Duration Critical After - The number of seconds a chat lasts before its duration sets off a critical alert.

Translations

SmarterTrack can automatically translate live chats via Microsoft Translator or Google Translate. Because both Microsoft and Google charge a fee for their translation service, SmarterTrack will track how many characters and requests your server has attempted to translate to aid you in managing your translation subscription costs.

Use this tab to edit the following translation settings:

• Auto Translation Method - Select which translation service to use from the list. By default, the auto-translation method is set to none.

• API Key - For Google Translate only. The API key provided by Google. For more information on obtaining this key, see How To Automatically Translate Live Chats .

• Client ID - For Microsoft Translator only. An identifier used to represent your SmarterTrack installation. You will create the Client ID when you register your SmarterTrack installation with the Microsoft Azure Marketplace.

• Client Secret - For Microsoft Translator only. A security key that allows Microsoft Translate to interact with your SmarterTrack installation. For more information on obtaining this key, see How To Automatically Translate Live Chats .

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 System Settings and Live Chats 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 - Allows you to create a new set of live chat link scripts.

Edit - Allows you to edit an existing live chat script.

Delete - Allows you to delete an existing live chat script.

Creating a New Live Chat Script

When creating a new live chat script, the following options are available from the content pane toolbar:

• Save - Creates a live chat link.
• Generate Script - Generates the script(s) that appear in the Live Chat Link Script section.
• Cancel - Cancels without saving any changes.

In addition, 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 you're generating. These can signify the brand you're creating the links for, the website the links will go on, or any other naming convention you choose.
• Refresh Rate - The number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available. By default, the refresh rate is 30 seconds.
• Enable for [Department Name] - If there are multiple departments created within SmarterTrack, it is possible to select which departments will be available for live chat when usign the live chat script.

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. (I.e., there are agents available to chat, it is within business hours, etc.)
• 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, if there is one available. 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.

Generating the Script

Once all of the tabs are filled out - options set, images in place and linked properly - it's time to actually generate your live chat scripts. To do so, click the Generate Script button in the content pane toolbar. You will be presented with the following options:

- Host Header - In those instances where customers are utlizing multiple brands and have host headers set up for each, a unique live chat script can be generated for each brand that is set up. Leaving this as the default means that the script will be generated for the SmarterTrack Base URL.
- Script Type - There are 2 script types, depending on how and when you want the live chat script to load. They are:

- Normal Script - Select this option to generate a standard link script.
- Deferred Script - Select this option to make your live chat links load after the rest of your website is loaded into a visitor's browser. Using a deffered script means that your entire website will still load even if your SmarterTrack portal is down. When using a normal script, the live

chat links will load first, thereby potentially causing your website to fail to load if there are problems with your SmarterTrack portal.

• Put in <HEAD> tag - This is the actual script that will be placed on your website, between the <HEAD> and </HEAD> tags. The code should be copied and pasted exactly as it appears.
• Put in Place of Image - If you are not going to use an image for your online/offline status indicators, and are planning on using text only, copy and paste this script in the location where you want your live chat status to appear.

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 administrator may create permanent chat rooms to host agent conversations. Chat rooms allow multiple different agents to join in group-level, department-level or even company-level conversations versus the one-on-one type of conversation handled via instant messenger.

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). Note: Administrators may need to access the chat rooms by clicking the settings icon , then expanding the System Settings and Live Chat folders in the navigation pane and clicking Chat Rooms .

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

Active and Inactive Chat Rooms

To view an active or inactive chat room, expand Chat Rooms button in the navigation pane, then click Active to view active chat rooms or click Inactive in 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 specific chat room by expanding By Chat Room in the left tree view and selecting the appropriate chat room.

Live Chat Distribution Methods

There are two basic distribution methods for live chats: the default distributon and Round Robin distribution, and the method used is determined by administrators when configuring Live Chat Settings . On the Options tab in Live Chat Settings, if the box next to "Distribute chats via Round Robin" is checked, then that distribution method will be used. If it is unchecked, live chats will follow the default distribution model.

Default Distribution

Also known as "cherry picking," under the default 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 smaller companies with lower volumes of live chats.

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 within 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

Administrators can create categories to organize time logs into related groups. For example, if a 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

Who's On is a great way to take stock of your website traffic, and then act on that knowledge, by allowing agents and managers to see who is on a website, where they are from, where they were prior to coming to the website and then follow visitors as they travel from page to page. For example, sales agents can see when a vistor lands on a specific page and possibly invite the visitor to a live chat or even push a live chat to the visitor to entice them to buy.

To access this section, click the settings icon . Then expand System Settings and Who's On 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 - An idle visitor is someone who comes to a site and then, for whatever reason, they sit for a period of time without taking any additional action. For example, a visitor lands on your site and then opens a new browser tab and starts surfing another site. These visitors you probably don't want to continue monitoring, so you can purge them 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 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: 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 settings for how and where an invitation to chat appears to the visitor:

• 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, administrators and agents have the ability to segregate website and/or portal visitors into groups based on the pages they are viewing. For example, sales agents may only be interested in visitors on product pages or people who are progressing through your shopping cart while marketing agents may be interested in visitors on specific landing pages that were used for promotions or in currently-running advertisements on radio, television, banner ad campaigns or PPC.

To access Who's On filters, click the settings icon . Then expand System Settings and Who's On 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 administrator to make changes to a filter's settings.
- • Delete - Permanently deletes the selected filter(s).

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 toolbar:

- • Save - Allows the administrator to save changes made to a filter's settings.
- • Add Condition - Allows the administrator to add filter criteria.
- • Edit - Allows the administrator to make changes to filter criteria.
- • Delete - Permanently deletes the selected condition(s).
- • Cancel - Cancels the creation of the filter.

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 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 System Settings and Globalization 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 administrator to designate a new supported language.
- Edit - Allows the 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, 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 System Settings and Globalization 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 administrator to designate a new supported language.
- Edit - Allows the 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 for tickets, live chats and call logs that is outside of the default information gathered by SmarterTrack. To do this, administrators can create an unlimited number of Custom Fields. Custom fields can be used to define virtually any additional information a company may need and can be applied to tickets, live chats, call logs, advanced searches, reports, and organizational settings (such as users, groups and departments). In addition, companies can use custom fields when creating communciation Templates for live chats or tickets and then require end users to supply specific pieces of information with their ticket or live chat to aid employees with troubleshooting issues or even looking up accounts as the live chat or ticket response progresses. Custom fields are also available in various summary and trend reports, giving managers the ability to group data items by the custom fields that are created. NOTE: Custom fields can be used to display up to 512 characters of information per field.

For example, a manager for a support department can add a custom field for the model numbers of their products, and then add that custom field to ticket and live chat templates that SmarterTrack uses. In addition, the custom fields are availble when the manager runs reports, such as the Ticket Overview report, and they will be able to group the results by each model number.

Generally, there are two different types of custom fields:

- Regular custom fields are used to gather additional information on items agents may be working on, such as tickets, live chats and call logs. For example, if a company has multiple products for which they provide technical support, they may create a custom field for tickets that specifies which product the customer is requesting assistance with. Taking this example further, a company could use custom fields to require customers to provide specific information

before submitting tickets or live chats: the customer's contact details, the browser they're using, their interest in promotional offers or partnership opportunities, etc.
• Organizational custom fields are used to gather additional information on users, groups or departments. Unlike regular custom fields, organizational custom fields are created by the system administrator, but they are viewable by any agent or manager as well by selecting "User Details" from any email address associated with a ticket, live chat or call log. For example, a system administrator may use an organizational custom field to store details on a user, such as a phone number, account number, social media address or a note.

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 users, groups or departments.

The following options are available from the content pane toolbar:

• New - Creates a custom field.
• Edit - Allows the administrator to make changes to a custom 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.
• Applies to users, groups, etc. (Organizational) - Checking this box will allow the administrator to use the custom field for users groups and departments.
• 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 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 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

SmarterTrack offers several default templates that can be used for call logs, live chats and tickets. While these will accommodate most users of SmarterTrack, some companies may want to gather information that is not recorded in these default templates. Therefore, custom fields definitions can be used to define the additional information a company may need and then these fields can be added 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 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 customers and/or agents that describes 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 require users to complete this custom field.
- • Required for agents to respond to tickets - 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.
- • Show in communication view - Checking this box means that custom fields will appear in an agent's compose window when submitting tickets to SmarterTrack. Custom fields will appear once the agent has selected the group the ticket is submitted to, or the group that is sending the ticket to the customer.

Activation

Licensing

To access view licensing information for SmarterTrack, click the settings icon . Then expand System Settings and Activation 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 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 System Settings and Activation and click Self Diagnostic in the navigation pane. SmarterTrack will perform a test and display the results in a popup window.

SmarterTrack's self diagnostic tool will review a variety of different settings to help adminsitrators troubleshoot potential issues. For example, the tools will check file permissions, internet connectivity, folder permissions and more.