



Setup

Help Documentation

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 process, 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.
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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 navigation 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 option 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 functionality. 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 available 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 available 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 settings 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 administration 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 associated 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 information 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.