Organization

Help Documentation

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.