



# Portal

Help Documentation

# 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 initiate 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 additional 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 folders 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 folders 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.