



General Information

Help Documentation

General Information

What is SmarterTrack?

SmarterTrack is, at its core, a communication platform. With it, businesses and individuals are able to interact with their customers and end users using one or more communication channels -- from email to live chat, phone calls to the creation of self-help communities and resources. In addition, SmarterTrack offers a number of internal communication methods so that employees, agents and managers can get the help they need, when they need it. Features include:

- A world-class ticketing solution
- Live chat
- A comprehensive knowledge base
- A customer community
- A public Web portal
- Call logs and VoIP integration
- A SIP-compliant softphone
- Who's On visitor monitoring
- A complete task management system
- Time logs
- Self-help resources: knowledge base, news items, etc.
- Multiple brand support
- An integrated survey system
- More than 70 summary and trend reports
- Support for Single Sign-On (SSO)
- And more...

SmarterTrack is a complete customer service solution for individuals, small businesses, and enterprise organizations and is available as a traditional software installation or as a hosted service. In addition to providing your company with an effective customer support structure, SmarterTrack offers powerful tracking and effective reporting that help to manage company costs and employee scheduling.

What is SmarterTrack Communicator?

SmarterTrack Communicator is a SIP-compliant voice over IP (VoIP) softphone that seamlessly integrates a company's phone system with SmarterTrack. It is a licensed add-on and is configurable from within SmarterTrack, which means that all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to

transfer calls, automatically creates call logs, displays incoming and outgoing call information, can record calls for later review, offers complete call analytics and allows businesses to keep all customer communication (tickets, live chats and call information) in one location.

NOTE: The .NET 4.0 framework is required and should be installed on the laptop or desktop that will be running SmarterTrack Communicator. You can download the Web installer for .NET from the Microsoft Download Center .

SmarterTrack Communicator offers all of the features of a standard VoIP softphones, including:

- The ability to record incoming and outgoing calls
- The ability to transfer calls between agents and departments
- Multi-line support
- Complete call history
- Phone contact list
- Recent call log
- Automatic call log creation
- Volume controls
- Mute button
- The ability to display incoming call info
- Multi-brand support

For more information, see the SmarterTrack Communicator interface diagram .

SmarterTrack Edition Explanation

Professional Edition vs. Enterprise Edition

SmarterTrack Professional has all of the features required to manage a fully-functional help desk.

SmarterTrack Enterprise offers additional features, including:

- Mobile interface for smartphone users
- Scheduled and on-demand email reports
- Customer satisfaction surveys
- Single Sign-On (SSO)
- Support for multiple brands
- External providers
- Failover functionality Note: Requires a SmarterTrack Enterprise with Load Balancing Functionality or SmarterTrack Enterprise with Failover Functionality license.

SmarterTrack Free

SmarterTrack Free contains much of the same functionality as SmarterTrack Enterprise, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

SmarterTrack Edition Comparison

You can also refer to the following edition comparison chart for more information about each edition.

Management Interface

Features	Free 1	Pro	Enterprise
Tickets			
Agent responses by email	•	•	•
Transfer tickets (to agents, departments, groups and other installations)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Automatically suggests related tickets and knowledge base articles	•	•	•
Comments and resolutions	•	•	•
View/search ticket history	•	•	•
Canned replies	•	•	•
Mark tickets for follow-up	•	•	•
Ticket surveys	•		•
Advanced ticket searching	•	•	•
Define custom fields for tickets	•	•	•
Force complete custom fields (agents only)	•	•	•
Get Assistance feature for agents	•		•
Multiple user-defined signatures per agent	•	•	•

Enforceable company-wide signature standard	•	•	•
Dynamic signature attributes by brand, language, etc.	•	•	•
Intelligent ticket routing (via cherry picking or round robin)	•	•	•
Custom ticket distribution options using Events	•	•	•
Tickets assigned to agent's brand and/or language	•		•
Automatic and manual rebalancing of ticket workload	•	•	•
Time logging	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Handle chats inline or as a popup	•	•	•
Audible and visual alerts	•	•	•
Chat idle time warning levels	•	•	•
Transfer chats (to agents, departments, and groups)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Automatically suggests related knowledge base articles	•	•	•
View/search chat history	•	•	•
Automated responses	•	•	•
Live chat surveys	•		•
Advanced chat searching	•	•	•
Define custom fields for chats	•	•	•
Force complete custom fields (agents only)	•	•	•

Available/Unavailable settings when going AFK	•	•	•
Get Assistance feature for agents	•		•
Google Maps and Bing Maps integration	•	•	•
Manage chat queues	•	•	•
Multiple chat session support	•	•	•
Co-chat with other agents	•	•	•
Administrator participation without transfer (coaching)	•	•	•
Agent chat rooms	•		•
Agent instant messaging	•		•
Automatic agent failover	•	•	•
Support for alternate agent avatars and identities (aliases)	•	•	•
Intelligent routing (via cherry picking or round robin)	•	•	•
Custom chat distribution options	•	•	•
Live chats assigned by agent's brand and/or language	•		•
Time logging	•	•	•
Calls			
Track incoming and outgoing phone calls	•	•	•
Automatically suggests related knowledge base articles	•	•	•
Cross-associate tickets, live chats, calls and tasks	•	•	•
Integration with most VoIP systems	•	•	•
Click-to-call functionality	•	•	•
SIP-compliant softphone		Add-on	Add-on
Tasks			

Time logging	•	•	•
Assign tasks to agents	•	•	•
Assign a status to a task (approved, in progress, etc.)	•	•	•
Create recurring tasks	•	•	•
Visual alerts for overdue tasks	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Managers can view and track tasks for their departments	•	•	•
Who's On			
Live monitoring of users on website	•	•	•
Filter visitors by brand, page, or any available attributes	•		•
Advanced visitor and session display in preview pane	•	•	•
Integrated with live chat for pushing and inviting of live chats	•	•	•
Filtering of users on website	•	•	•
World geographic density map	•	•	•
Who's On surveys	•		•
Integrated with events system for automated actions	•	•	•
Knowledge Base			
Embed document links in KB articles and news items (attachments)	•	•	•
Embed flash files (.swf) in KB articles and news items	•	•	•
Embed media files in KB articles and news items	•	•	•
Organize KB articles and news items by brand	•		•

Edit multiple KB articles concurrently	•	•	•
HTML tag stripping tool	•	•	•
Set stale dates for KB articles	•	•	•
Mark KB articles for review	•	•	•
View statistics for a KB article	•	•	•
View unsuccessful KB search queries	•	•	•
KB article comments and ratings system	•	•	•
Check articles for broken links	•	•	•
Quick comment and rating moderation	•	•	•
Assign articles to agents for creation	•	•	•
Events And Notifications			
Event-driven architecture	•	•	•
Notification profiles	•	•	•
Combine multiple actions into a single, manual event	•	•	•
Assign actions to events (.e.g. transfers, escalations, notifications)	•	•	•
Service Level Agreements (SLA) compatible	•	•	•
Automatically launch surveys from events	•	•	•
Assign actions to monitored survey results	•	•	•
Compatible with SmarterNotify real-time notifications	•	•	•
Reporting			
Summary reports (17 system and 18 agent)	•	•	•
Trend reports (26 system and 18 agent)	•	•	•
Cost analysis reports	•	•	•

Multiple event reports	•		•
Survey reports by agent, department, or group	•		•
Custom field reports	•		•
Scheduled and on-demand email reports	•		•
Define report favorites	•		•
Define custom reports	•		•
Dual-axis charting	•	•	•
Administration			
Agent roles system	•	•	•
Define company structure	•	•	•
Multiple brand support	•		•
Hidden departments	•	•	•
Agent avatars to personalize customer communication	•	•	•
Assign departments to a specific language	•	•	•
Assign departments and agents to specific brands	•		•
Real-time monitoring of tickets	•	•	•
Real-time monitoring of live chats	•	•	•
Supervisor monitoring	•	•	•
Quality control	•	•	•
Master categories for improved organization	•	•	•
Monitor live chat rooms	•		•
Monitor and review individual surveys	•		•
Optimized database for large volumes	•	•	•
Minimum password requirements and enforcement	•	•	•
Extensibility			

External providers with custom fields	•		•
Define custom fields for live chats and tickets	•	•	•
Link to third-party databases via external providers	•		•
Authenticate customer and agent logins via third-party sources	•		•
Web services allow for integration into other applications	•	•	•
Web Interface			
Custom CSS for customization of the customer portal and management interface	•	•	•
Optimized AJAX controls provide desktop application performance	•	•	•
Multi-language compatible	•	•	•
AJAX spell-check	•	•	•
Rich text editing	•	•	•
Compatible with most tablets (iPad, Nexus 7, etc.)	•	•	•
Mobile Interface			
Low bandwidth interface for smartphones (iPhone, Android, etc.)	•		•
Installation			
Hosted service option (SaaS)			•
Failover functionality 2			•
VPS server installation option	•	•	•
Shared server installation option	•	•	•
IIS 6.0+ supported/recommended	•	•	•

Compatible with shared hosting environments	•	•	•
Supports MySQL Server 5.0 and higher	•	•	•
Supports SQL Server 2005 and higher	•	•	•
Implementation in Microsoft .NET 4.0	•	•	•

Portal Interface

Features	Free	Pro	Enterprise
Tickets			
Submit tickets through the portal	•	•	•
Submit tickets through email	•	•	•
Automatically suggests related KB articles during ticket submission	•	•	•
Insert attachments (configurable)	•	•	•
Capture visitor data (custom fields)	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Enabled chat links into website	•	•	•
Online/offline indication	•	•	•
Push webpages	•	•	•
Send files via live chat	•	•	•
Agent typing indicator	•	•	•
Capture visitor data (custom fields)	•	•	•
Email and print live chat transcripts (customer side)	•	•	•
Customizable chat icons	•	•	•
Detect and recover from lost connection	•	•	•
Knowledge Base			

KB article translation (link to manual translations or auto-translate with the built-in translation tool)	•	•	•
SEO-friendly article representation	•	•	•
Organized by category	•	•	•
Searchable (full natural search support)	•	•	•
Private KB articles	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Security			
Define role permissions for agents and end-users	•	•	•
Extended pre-defined roles (e.g. everyone, agent, registered user)	•	•	•
CAPTCHA support for ticket submission (optional)	•	•	•
Anonymous/registered/authenticated user methods	•	•	•
News			
Multi-lingual support for all news items	•	•	•
SEO-friendly	•	•	•
RSS feeds	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Web Interface			
STInterfaceFramework (standardized skinning and elegant navigation)	•	•	•
Tabbed interface for improved organization	•	•	•
Multi-lingual support for all interface text	•	•	•
Customizable company logo	•	•	•

Google Analytics integration	•	•	•
Compatible with most popular Web browsers	•	•	•
Compatible with most mobile devices and tablets (iPad, iPhone, Android, etc.)	•	•	•

1 SmarterTrack Free Edition contains much of the same functionality as SmarterTrack Enterprise Edition, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

2 Requires activation of the SmarterTrack Enterprise with Failover Functionality license.

Customer Service Software Competitor Comparison

Pricing and features are taken directly from related websites, customer support, and marketing materials as of June 1, 2011. Information, features, and pricing are subject to change. To report corrections, please contact the SmarterTools Sales Department via live chat or sales@smartertools.com.

Features	Desk.com (Assistly)	Zendesk Plus+	Kayako Fusion	SmarterTrack Enterprise	SmarterTrack.com
Initial cost for 10 agents	\$290/month*	\$490/month*	\$999	\$999	\$150/month
All-in-one integrated Web interface	•	•	•	•	•
Ticket system	•	•	•	•	•
Mobile ticket management	•	•	•	•	•
Live chat	3rd Party	•	•	•	•
Live chat translation	–	•	–	•	•
Live chat geo-location	–	–	•	•	•
Co-chat	–	–	•	•	•
Coaching	–	–	•	•	•
Proactive chat	•	•	•	•	•
Agent instant messaging	–	–	–	•	•
Agent chat rooms	–	–	–	•	•

Website visitor monitoring (Who's On)	–	–	•	•	•
Intelligent routing	•	•	•	•	•
Predefined responses	•	•	•	•	•
Call logs	–	–	•	•	•
Time logs	–	–	•	•	•
Task management system	–	•	–	•	•
Knowledge base	•	•	•	•	•
Customer portal	•	•	•	•	•
Search engine optimized portal	–	–	–	•	•
Survey system	–	–	•	•	•
Cost analysis reporting	–	•	–	•	•
Advanced premium reporting	•	•	•	•	•
VoIP integration	–	•	•	•	•
Click-to-call functionality	–	–	•	•	•
Multiple language support	–	•	•	•	•
Multiple brand support	–	–	•	•	•
Extendable to other databases & applications	•	•	•	•	•
LDAP & active directory authentication	–	•	–	•	•
System-wide events & notifications	–	•	Limited	•	•
Per agent file storage	–	–	•	•	•

Failover functionality	–	–	–	Available	–
Software ownership	–	–	Available	Available	–
Hosted option (SaaS)	Available	Available	Available	–	Available
Hosted Pricing	\$290/month*	\$490/month*	\$490/month	N/A	\$150/month
Ownership Pricing	N/A	N/A	\$999	\$999	N/A

*If prepaid annually

How SmarterTrack Works

There are two main components that work together within SmarterTrack: the Web interface and the database backend. Both components must be active for SmarterTrack to operate.

Web Interface

The Web interface is a website that is used for administration and interactivity with SmarterTrack. It is divided into two components: the management interface and the portal interface. Administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets and chats. Customers can also use the portal interface to retrieve ticket information, submit new tickets and chats, or search Knowledge Base articles.

SmarterTrack Communicator

SmarterTrack Communicator is a SIP-compliant softphone that works with all major SIP-compliant VoIP phone servers. SmarterTrack Communicator is a licensed add-on and is configurable from within SmarterTrack. Therefore, all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to transfer calls, automatically creates call logs, displays incoming and outgoing call information, can record calls for later review, offers complete call analytics and allows businesses to keep all customer communication (tickets, live chats and call information) in one location.

Database Backend

SmarterTrack needs a database to store data. For SmarterTools customers using Hosted SmarterTrack, the database backend is installed on servers managed by SmarterTools. For more information regarding the database backend requirements, see [Setting Up the Database](#) .

Browser Requirements

SmarterTrack is fully supported by the browsers below.

- Google Chrome 10 and higher
- FireFox 3.6 and higher
- Safari 3 and higher
- Opera 10 and higher
- Internet Explorer 9 and higher

Mobile

With regards to mobile browsers, the SmarterTrack interface works well on most major browsers available for tablets and other larger-format mobile devices (e.g., Mobile Safari, Dolphin). For information on the SmarterTrack mobile interface for smartphones, see the mobile support outlined on the jQuery mobile framework website.

Using the SmarterTrack Mobile Interface

Agents on-the-go have two options for accessing SmarterTrack from tablet computers, smartphones or other mobile devices:

- Use their mobile browser to navigate to their help desk installation just as they do at their desktop computer. Both the management and portal interfaces are optimized for mobile devices like the iPad/iPod and Android tablets with support for scrolling and gestures and easy to click buttons. Plus, SmarterTrack seamlessly integrates with other mobile apps, allowing remote employees to provide customer service, sales or support as efficiently as they do from the office computer.
- Connect via the mobile interface at [http://\[yourSmarterTrackUrl\]/m](http://[yourSmarterTrackUrl]/m) . Designed to meet the needs of smartphone users, the mobile interface allows agents to respond to tickets and live chats on most smartphones, including the iPhone, Android, new BlackBerry devices and Windows Phones. Note: The mobile interface is only available to users of SmarterTrack Enterprise.

Using SmarterTrack with SmarterNotify

SmarterNotify is an easy-to-use, Windows-based desktop alert program that makes monitoring software applications and networks convenient by eliminating the need for always-open Web browsers and server connections. Because both SmarterTrack and SmarterNotify were built by SmarterTools developers, the two programs are highly compatible. SmarterTrack's event system allows users to act

on events that occur throughout the system when they occur, such as the creation of a new ticket or the modification of a knowledge base article. Many users will find that using SmarterTrack in conjunction with SmarterNotify will free up their workspace because there will no longer be a need to keep the SmarterTrack Web application open to receive event notifications from SmarterTrack.

Examples of how SmarterNotify can be used in conjunction with SmarterTrack include:

- An escalation department that only receives a few tickets each day may use SmarterNotify to alert agents or administrators when a customer has responded to a ticket or a ticket is transferred between agents.
- A supervisor may configure the programs to notify him when there are too many tickets in the queue or when a ticket is waiting too long for a reply.
- And more.

To use SmarterNotify in conjunction with SmarterTrack, you'll need to create an event in SmarterTrack as usual. Then you will need to create a corresponding connection profile in SmarterNotify. For more information on using SmarterTrack with SmarterNotify, refer to the SmarterNotify Online Help . To download SmarterNotify, visit the SmarterTrack Downloads page of the SmarterTools website.

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