



Custom Fields

Help Documentation

Custom Fields

Field Definitions

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

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

Generally, there are two different types of custom fields:

- Regular custom fields are used to gather additional information on items agents may be working on, such as tickets, live chats and call logs. For example, if a company has multiple products for which they provide technical support, they may create a custom field for tickets that specifies which product the customer is requesting assistance with. Taking this example further, a company could use custom fields to require customers to provide specific information before submitting tickets or live chats: the customer's contact details, the browser they're using, their interest in promotional offers or partnership opportunities, etc.
- Organizational custom fields are used to gather additional information on users, groups or departments. Unlike regular custom fields, organizational custom fields are created by the system administrator, but they are viewable by any agent or manager as well by selecting "User Details" from any email address associated with a ticket, live chat or call log. For example, a system administrator may use an organizational custom field to store details on a user, such as a phone number, account number, social media address or a note.

Use the Field Definitions section to create a new custom field. To view a list of custom fields currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields

folders and click Field Definitions in the navigation pane. A list of custom fields will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple field definitions. Custom field definitions must be selected before choosing an action from the toolbar.
- **Field Identifier** - The name of the custom field.
- **Data Type** - The format in which the custom field data is provided.
- **Organizational** - Indicates whether the custom field can be applied to users, groups or departments.

The following options are available from the content pane toolbar:

- **New** - Creates a custom field.
- **Edit** - Allows the administrator to make changes to a custom field's settings.
- **Delete** - Permanently deletes the selected custom field.

To view the details for a specific custom field, simply double-click the custom field. The custom field details will load in the content window and the following fields will be available:

- **Field Identifier** - The name of the custom field.
- **Data Type** - To specify the data type, select the appropriate option from the list.
- **Applies to users, groups, etc. (Organizational)** - Checking this box will allow the administrator to use the custom field for users groups and departments.
- **Default Value** - The default contents of the custom field. This field is optional, and is often left blank. However, it can provide useful in certain circumstances. For example, a company may want to create a custom field that allows customers to opt in or out of promotional emails. To encourage customers to opt in, the administrator may configure the default value to indicate that the customer is willing to receive promotional emails.

Search Definitions

Note: This is an advanced feature that will change the submission process for tickets and live chats.

Search definitions are used to create a custom submission process for tickets and live chats. In general, search definitions work by connecting to an external database and searching to see if any results match the query. For example, a company may configure a department to only accept live chats from customers with an invitation code. The field in which the customer enters the invitation code is the search definition. When the customer submits the code, SmarterTrack will execute the query by

connecting with the external database storing the code to see if the code is valid. If the system determines the code is valid, the customer will be allowed to initiate the live chat.

To view a list of search definitions currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields folders and click Search Definitions in the navigation pane. A list of search definitions will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select search definitions. Search definitions must be selected before choosing an action from the toolbar.
- **Display Name** - The name of the search field.
- **Query Type** - The type of database to which SmarterTrack connects to execute the query.

The following options are available from the actions toolbar:

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

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

Query

Use this tab to edit the following settings:

- **Display Name** - The name of the search field.
- **Query Type** - The type of database to which SmarterTrack connects to execute the query.
- **Connection String** - The code that defines how the system connects to the external database.
- **SQL Query** - The script that the search definition executes.

Inputs

Use this tab to edit the following settings:

- **Display Name** - The text displayed to customer describing the custom field.
- **Parameter Name** - The variable that is used in the query to define the value of the custom field.
- **Password Field** - Checking this box will mask the text that the customer types into the custom field.

Outputs

This tab displays existing field definitions in the SmarterTrack system. These fields are optional, and if they are left blank, the system will use the default values assigned to the field definitions.

Templates

SmarterTrack offers several default templates that can be used for call logs, live chats and tickets. While these will accommodate most users of SmarterTrack, some companies may want to gather information that is not recorded in these default templates. Therefore, custom fields definitions can be used to define the additional information a company may need and then these fields can be added to tickets, live chats, advanced searches, reports, and system settings.

Templates are used to define which custom fields are available to customers through tickets and live chats. To view a list of templates currently in use by the system, click the settings icon . Then expand the System Settings and Custom Fields folders and click Templates in the navigation pane. A list of templates will load in the content pane.

The following options are available from the template toolbar:

- New - Creates a new template.
- Edit - Allows the administrator to make changes to a template.
- Delete - Permanently deletes the selected search template(s).

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

Options

Use this tab to edit the following setting:

- Display Name - The name of the template.

Field Definitions

Use this tab to add existing field definitions to this template. For more information, see the Field Definitions section of the online help. When adding or editing field definitions to a template, the following options are available:

- Custom Field - The custom field to be added to the template.
- Display Name - The text displayed to customers and/or agents that describes the custom field.
- Visibility - To specify whether the field definition is available to users, agents, or both, choose the appropriate option from the list.

- Required by users - Checking this box will require users to complete this custom field.
- Required for agents to respond to tickets - Checking this box will require agents to complete this custom field before sending a ticket response.
- Required for agents to close tickets - Checking this box will require agents to complete this custom field before closing a ticket.
- Show in communication view - Checking this box means that custom fields will appear in an agent's compose window when submitting tickets to SmarterTrack. Custom fields will appear once the agent has selected the group the ticket is submitted to, or the group that is sending the ticket to the customer.