



Integrations

Help Documentation

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WHMCS SmarterTrack Provisioning Module

Package Description

The WHMCS SmarterTrack module is an open source module developed in PHP that replaces the default ticket and support system within WHMCS with a SmarterTrack help desk. The module can be used with an installed and licensed version of SmarterTrack or with a hosted help desk at SmarterTrack.com. Users' usernames and passwords can be synced between the two platforms and users are able to view, reply to, and close tickets from within the client interface in WHMCS. There is also the ability to initiate live chats from the WHMCS interface as well as a link to knowledgebase articles within SmarterTrack.

Package Goals

The primary goal for the SmarterTrack module is to eliminate the multi-platform maintenance for customer support agents in a business. Agents can maintain support issues inside of SmarterTrack without having to worry about WHMCS at all.

The SmarterTrack module provides the following:

- The ability to override the knowledge base links within WHMCS to redirect to SmarterTrack's knowledge base articles
- The ability to provide live chat support links within WHMCS that will pop up a SmarterTrack live chat within the WHMCS interface
- The ability to override "contact us" email to start a ticket within SmarterTrack rather than an email to a chosen email address. The ticket will also have a different comment added to it that states it was submitted via Sales Acquisition. You also get to specify which department these tickets are automatically submitted to
- Full email ticket support, including:
 - Include / exclude departments based on settings within SmarterTrack
 - Full custom field support
 - A comment added to every ticket submitted to show it was created through WHMCS
 - Customizable auto responders with the ability to direct ticket links to WHMCS rather than SmarterTrack
 - View all tickets on the support tickets page and all open tickets on client area page
 - Restrict users from closing tickets based on settings set in SmarterTrack
 - Help phone number and / or email address to be displayed on error pages

- Full email / username and password support. This means that whenever a client changes their email or password in WHMCS, the change will also reflect within SmarterTrack
- A page in the management interface of WHMCS for syncing SmarterTrack and WHMCS users. (SmarterTrack uses the client's email address for the username)
- Full open source module with language string overrides, a custom style sheet and custom client template pages that can all be modified to serve a company's needs

Prerequisites

- Existing installation of WHMCS (version 5.0 and above)
- Existing SmarterTrack installation (version 8.4 or above) or hosted help desk at SmarterTrack.com

Installation and Configuration

Installing the SmarterTrack module is no different than installing any modules within WHMCS.

Below are the steps necessary to get a SmarterTrack installation added to WHMCS.

- Extract the SmarterTrack module
- Place the contents in your WHMCS directory under "..modules/addons/smartertrack"
- Navigate to [http\(s\)://your_WHMCS_hostname.com/admin/configaddonmods.php](http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php)
- Click "Activate" next to the SmarterTrack HelpDesk Module
- Fill out the following properties:
 - SmarterTrack Help Desk URL - the base URL for your SmarterTrack instance. For installed versions of SmarterTrack, use whatever URL you set up for accessing your help desk from a Web browser. For hosted customers, use the base URL that contains the SmarterTrack.com domain. (E.g., <http://example.smartertrack.com>)
 - Administrator Name - The administrator username set up in SmarterTrack
 - Administrator Password - The password associated with the administrator username
 - Override Default KB - Enabling this option will override the default WHMCS knowledge base with the KB system within SmarterTrack. NOTE: When users click on a KB article link, they will be redirected to the SmarterTrack Web portal as the articles are not imported into WHMCS.
 - Help Phone Number - If you provide telephone support this optional field will be displayed on any error pages, should errors occur
 - Override Pre-Sales 'Contact Us' - Optional override of the 'Contact Us' link. This allows any emails/tickets generated when a user clicks the link to be generated within SmarterTrack versus WHMCS.
 - Default Department Name for 'Contact Us' - The department name within SmarterTrack that

will be used for 'Contact Us' submissions

- MD5 Hash Enabled - If MD5 has is enabled in WHMCS, then you will need to check this. If MD5 is not enabled, then do not check this option. The biggest reason for this setting is to allow your customers to also lg in to the SmarterTrack portal if they so desire. If MD5 Hash is enabled, then customer passwords will NOT be the same for both platform logins. This is because MD5 is an irreversible hash, so there is no two-way sync. If you need to locate the MD5 has setting in WHMCS, follow these steps:

- Click the Setup tab, the click the first option: General Settings
- In General Settings, click the Security tab
- Towards the bottom of the settings list is the setting named 'Disable MD5 Client's Password.'

Note: If this is checked, MD5 is NOT enabled.

- Access Control - These are the roles that will be able to view the Management Interface side of the SmarterTrack WHMCS integration. In addition, this is the area where you will see logging and have the ability to sync users between SmarterTrack and WHMCS.
- Click Save to save your settings. Now, the SmarterTrack integration module is set up and configured.

General Tips

- You will want to disable users from changing their passwords within SmarterTrack. This setting can be found at 'Settings >> System Settings >> Portal >> Portal Settings' and on the Options tab, uncheck "Enable users to change passwords"
- You will want to configure your live chat script. The module will work with both image and plain text. There is also an image created just for the this module for live chats. It will take including it in the SmarterTrack images folder and configured in SmarterTrack under "Live Chat Links"
- You will want to configure autoresponders for each department that you use. The ticket link will link to the SmarterTrack Portal by default, so you will want to create your own link for your auto-responders. Your link's target will be the following:
yourdomain/viewticket.php?tid=#TICKETNUMBER#

Custom Fields for WHMCS

The following custom fields were created specifically to work with SmarterTrack and WHMCS and can be modified and populated with data from WHMCS:

- Email (single line text) - The email address of the WHMCS user
- Display Name (Single Line Text) - The first and last name of the WHMCS user
- Domains (Single Line Text) - In WHMCS, a drop down list that is populated with a user's

domains. The selected domain will be sent to SmarterTrack as a single line of text

- Product/Domain (Single Line Text) - In WHMCS, a drop down list that is populated with a user's products and associated domain. The selection will be sent to SmarterTrack as a single line of text

Note: The custom filed display names in SmarterTrack must match these names character for character or else they will not populate correctly.