



# Dashboards

Help Documentation

## Dashboards

Note: Agent, Group and Department dashboards require the Manager Role. SmarterTrack's dashboards give managers the ability to view a variety of information about users, groups and departments. For example, the User dashboard displays a listing of active and inactive agents, information about the groups the agents are logged into and more. The User dashboard also enables managers to edit agent status. The Group dashboard offers an overview of each group set up within SmarterTrack, including information about the number of active tickets, chats and calls as well as information about the agent status for tickets, chats and calls. Finally, the Department dashboard gives managers information about each department set up within SmarterTrack. More information about each dashboard is below.

### User

The ability to see the status of each agent in SmarterTrack is important to ensure that your agents are logged in, that they are actively taking care of customers and that there isn't a hole in your coverage. For example, if you notice that the phone is ringing continuously you can log in and make sure that there are agents actively taking calls, and maybe get one or two more agents logged in.

- User - A list of all agents. Active agents appear on the Active tab. Inactive agents appear on the Inactive tab.
- Status - The status of each agent. Available agents are those who are logged in and receiving tickets, live chats and/or phone calls in at least one group. Unavailable agents may be logged in but are not active in at least one group for live chats and/or phone calls. Note: an unavailable agent that is active will still receive tickets based on the ticket distribution method set up for the group they're active in, they just will not receive live chats or phone calls.
- Ticket Groups - The number of active ticket groups the agent is active in vs. how many they are assigned to. For example, 15/16 means that the agent is active in 15 of the 16 ticket groups they are assigned to.
- Chat Groups - The number of live chat groups the agent is active in vs. how many they are assigned to. For example, 6/10 means that the agent is active in 6 of the 10 chat groups they are assigned to.
- Call Groups - The number of call groups the agent is active in vs. how many they are assigned to. For example, 3/6 means that the agent is active in 3 of the 6 call groups they are assigned to.
- Active Tickets - The number of active tickets for the agent. This does not include tickets in waiting or closed status.
- Active Chats - The active live chats the agent has vs. their max live chat setting. This does not include chats in inactive status. For example, 2/5 means that the agent has 2 active live chats but they can have a maximum of 5 occurring at once.
- Active Calls - Whether the agent is active and taking phone calls. Note: This setting is only

available for customers using SmarterTrack Communicator, the SIP-compliant softphone add-on for SmarterTrack.

To change the status of an agent, select the agent and click Edit in the content pane toolbar or double-click a specific agent. For example, a manager can edit an agent's status and make them inactive in a new ticket or chat group if the agent forgets to log out for lunch or if the agent leaves for the day. For more information on agent status, see Agent Status .

## **Group**

The Group dashboard gives managers an terrific overview of what is going on with each group set up in SmarterTrack. Being able to see an overview of the workload for each group is important as it can show managers where agents are spending their time. If a given group only has 1 out of 6 agents active, it's good indication that some attention should be paid to that group; either it's understaffed or that group isn't terribly busy.

- Group Name - Each group set up in SmarterTrack will be displayed in the Group dashboard.
- Active Tickets - The number of active tickets for the group. This does not include tickets in waiting or closed status.
- Active Chats - The number of active live chats for the group. This does not include chats in inactive status.
- Active Calls - The number of calls currently occupying agents. Note: This setting is only available for customers using SmarterTrack Communicator, the SIP-compliant softphone add-on for SmarterTrack.
- Ticket Agents - The number of active agents receiving tickets for the group vs. how many agents are assigned to the group. For example, 15/16 means that there are 15 out of 16 agents active in tickets for the group.
- Chat Agents - The number of active agents receiving live chats for the group vs. how many agents are assigned to the group. For example, 6/10 means that there are 6 out of 10 agents active in live chats for the group.
- Call Agents - The number of active agents currently set up to use SmarterTrack Communicator for the group vs. how many agents are assigned to receive calls using SmarterTrack Communicator for the group. For example, 3/6 means that there are 3 out of 6 agents active to receive calls using SmarterTrack Communicator for the group.

## **Department**

The Department dashboard gives a very high level overview of what is going on with the company in general, and each department in particular. Using the Department dashboard is a good way to get a feel for how busy your agents are on a macro level. From there, managers can drill down using the Group and User dashboards.

- Department Name - Each department set up in SmarterTrack will be displayed in the Department dashboard.
- Active Tickets - The number of active tickets for the department. This does not include tickets in waiting or closed status.
- Active Chats - The number of active live chats for the department. This does not include chats in inactive status.
- Active Calls - The number of calls currently occupying agents in the department. Note: This setting is only available for customers using SmarterTrack Communicator, the SIP-compliant softphone add-on for SmarterTrack.
- Ticket Agents - The number of active agents receiving tickets for the department vs. how many agents are assigned to the department. For example, 15/16 means that there are 15 out of 16 agents active in tickets for the department.
- Chat Agents - The number of active agents receiving live chats for the department vs. how many agents are assigned to the department. For example, 6/10 means that there are 6 out of 10 agents active in live chats for the department.
- Call Agents - The number of active agents currently set up to use SmarterTrack Communicator for the department vs. how many agents are assigned to receive calls using SmarterTrack Communicator for the department. For example, 3/6 means that there are 3 out of 6 agents active to receive calls using SmarterTrack Communicator for the department.