



SmarterTrack 9.x

Help Documentation

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SmarterTrack Help

Welcome to the SmarterTrack Help System. In the tree menu on the left you will find various help topics that will help you use SmarterTrack more effectively. At the top of each page, there are links that will allow you to search the help, visit the SmarterTools Community, browse the knowledge base, watch product videos, or either print the page you're on or view the page as a PDF file. At the bottom of each content window, there is also a "Link to this page" text link that can be used for to send people directly to that page of the help file.

If you need assistance beyond what's available in this documentation, feel free to review the paid support options and self-help resources found on the Support Portal .

Getting Started

SmarterTrack is a powerful help desk application built for tracking, managing, and reporting on customer service and communications, including sales and support issues. Use the Getting Started section of the SmarterTrack Online Help as a quick resource to help you set up the application. Note: This section assumes you have already installed a database like Microsoft SQL Server, SQL Server Express or MySQL and downloaded the SmarterTrack installation file. (Installed only). Hosted SmarterTrack customers do not need to worry about installation because the database and installation file are already on the SmarterTools servers. However, hosted service customers will need to complete the Setup Wizard to activate and set up their hosted service.

Setting Up SmarterTrack

- **Getting Started Page** - After SmarterTrack is installed, a Getting Started webpage will load. This page includes a video walkthrough of the SmarterTrack set up process, including creating your departments, adding an initial agent, setting up your company information and more. It also includes a link to begin the set up process.
- **Database Connection** - Set up the SmarterTrack database. The Setup Wizard will ask you for the required connection details like the type of database you're using, login information and database name. For more information, see [Setting Up the Database](#) . (Installed only.)
- **Database Configuration Progress** - This page displays the progress of the database configuration.
- **License Setup** - The Setup Wizard will ask you for a valid license key to activate the Professional or Enterprise edition of the software. If you choose not to provide a license key, the product will run as the Free edition. For more information, see [Activating SmarterTrack](#) . (Installed only.)
- **Create Account** - This initial account will be assigned the administrator, manager and agent roles. These roles are necessary to edit system settings, add agents and departments and view all areas of the management interface. For more information, see [Roles](#) . The Setup Wizard will ask you for the username, display name and password for the account.
- **Company Information** - Here you'll create your default brand. Brands are one of the top tiers in the organizational structure in SmarterTrack and are used to specify which information is displayed on the self-service portal and to route communications to/from agents and customers. The Setup Wizard will ask you for the name of the company, the website URL, default time zone and the company logo (which will display in the self-service portal). You can add additional brands from within the management interface after completing the Setup Wizard. You can also modify brand information at any time, as needed. For more information, see [Brands](#) .

- **Departments** - Here you'll select any default departments you want to set up. The Setup Wizard will provide you with a list of the most commonly used departments within most organizations. Select as many as you want to add. If you want to modify or add other departments not listed, you can do that after completing the Setup Wizard. For more information, see [Departments](#) . Note: At least one department must be selected to complete the setup process. This is because, like brands, departments are an integral part of the organizational structure for routing communications to/from customers and agents.
- **Default Email Setup** - Here you'll configure the default email address SmarterTrack will use to send tickets. You'll need to know your SMTP server, SMTP server port and the username and password you use to authenticate with the SMTP server (if SMTP authentication is required) to complete this step. If you don't have this information, you'll need to contact your email provider to get it. If you want to use different email addresses for various brands or departments, you can set that up after completing the Setup Wizard. For more information, see [Brands](#) or [Departments](#) .
- When you click Finish in the Setup Wizard, you will be automatically logged into SmarterTrack's self-service portal using the account you created earlier. Here you'll see a welcome message, as well as some additional instructions on how you can get started customizing your help desk to meet your company's unique needs.

Recommended Step to Secure Your Installation

- Set up SmarterTrack as an IIS site, if necessary. For more information, see [Running as an IIS site](#) . (Installed only.)

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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Concepts

The SmarterTrack Philosophy

Customers judge the quality of an organization's customer service on the basis of availability, choice, and the speed at which they can get their issue resolved. For this reason, companies can no longer rely on a single channel to deliver products or services to their customers. With SmarterTrack, companies can reach out to their customers through many different communications channels and even guide their customers to the most cost-effective and efficient method.

To maximize the efficiency of multichannel interactions, companies need to help customers determine the best channels to use by guiding them through the sales and support process. In doing so, companies can shape when and how they interact with the people who buy their products and services--ultimately balancing the preferences of their customers with the economics of their channels.

The Customer Service Channels

In general, contemporary customer service channels should operate as a funnel, with customers utilizing the least costly channels first. Ideally, companies should aim to encourage customers to use channels in this order:

- Self-service (Knowledge Base articles, help files, white papers, news items, website information, etc.)
- Social service (Community forums, social networking sites, blogs, etc.)
- Live chat
- Ticket system
- Phone

Given that automated, self-service, and Web-based communications are inherently more efficient than those that require immediate agent attention, it makes sense to encourage as many communications as possible through these channels, thereby reserving agent resources to deal with highly complex issues.

Of course, some customers are going to work their way through all these customer service channels before resolving their issue--and that's OK as long as the company can successfully document the steps taken to resolve the issue and use this information to improve customer interactions at the top of the funnel. This will ensure that future interactions have the opportunity to be resolved earlier in the process next time.

For example, if an issue has escalated through the channels to a phone support incident before it is resolved, the company can now capture the data, search criteria, and steps taken to resolve the issue,

and push that information to its employees. This creates an opportunity to update the arsenal of resources to more efficiently and cost-effectively serve its customers. Two weeks later, when another customer with the same issue enters a similar search query in the Knowledge Base or types certain key words into the live chat window, the information will be available immediately and can be displayed to the customer or agent in real time. As a result, the customer will find a solution two steps earlier than the previous customer did--instantly bringing efficiency to the customer service team and increasing customer satisfaction.

Over time, the constant feedback of tickets, Knowledge Base articles, and searches into the communications funnel dynamically increases the number of resolutions occurring closer to the top. The increasing efficiency can result in tens of thousands of dollars in saved costs and increases in customer satisfaction as they receive detailed answers earlier in the customer service cycle.

Inefficient Service Channel Flow



Request	Dollars*
500	\$125
1000	\$500
2000	\$4,000
2500	\$23,750
4000	\$108,000
Total Cost:	\$136,375

* Based upon \$0.25 per self service, \$0.50 per social service, \$2.00 per live chat, \$9.50 per ticket/email, and \$27.00 per phone request.

Efficient Service Channel Flow

Request	Dollars*
4000	\$1,000
2500	\$1,250
2000	\$4,000
1000	\$9,500
500	\$13,500
Total Cost:	\$29,250

* Based upon \$0.25 per self service, \$0.50 per social service, \$2.00 per live chat, \$9.50 per ticket/email, and \$27.00 per phone request.

Managing Channels From One Application

While some companies may deploy multiple customer service channels through a variety of solutions, SmarterTrack allows companies to operate and manage these channels from a single application. In addition to making channel management more efficient, this provides companies with increased access to business intelligence and allows managers to identify relationships between various customer service channels.

For example, SmarterTrack can report on live chats, tickets, and Who's On results to determine how customers are finding information on a website and compare their ability to use that information. Similarly, a company can utilize custom fields to capture customer-specific information (such as physical location, product serial number, server location, etc.). Reports can then be configured to identify specific areas of concern (locate errant networks, identify faults to the manufacturing location or supplier, identify agents struggling with certain topics/issues, etc.).

Company Organization

SmarterTools recommends emulating your company structure in SmarterTrack. For example, if your company has several departments such as billing, sales, development, or operations, and then sub-departments -- or groups -- you should set up SmarterTrack to have the same structure.

Typically, each department will have its own email address, such as support@example.com or sales@example.com. SmarterTrack can import emails from these accounts to create new tickets for the department, and can analyze the email for responses to existing tickets. Emails sent from agents in the departments can then be sent from the department email address so that they do not have to give their personal email addresses to customers, and all communication can be logged and tracked.

Department are then broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. When an employee from level 1 does not know how to respond to a ticket, they can simply transfer the ticket to a level 2 employee. This can be done with live chat as well.

Depending on the size of your company, you may have several different groups within each department. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

The following examples will help illustrate how typical companies may set up SmarterTrack and will explain some fundamental organizational concepts.

A Small Travel Agency

Company Info: This is a small travel agency that deals with a limited number of clients. The company has five employees: two employees work in sales; one employee coordinates scheduling and reservations; one employee performs HR, billing, and office management duties; and another individual owns the company and serves as the CEO.

Reason for Adopting SmarterTrack: The company intends to use SmarterTrack to offer support through email tickets, specifically regarding changes to travel plans and sales inquiries. They intend to use live chat during business hours for sales inquiries if their agents are available. They would also like to track the source of customers that ask for help.

Recommended Organization: Since there are relatively few employees in the company, the need for separate escalation groups is probably not necessary. As a result, a good setup for the company in SmarterTrack would be the following:

- Sales department, sales@example.com
- Level 1 sales
- Reservations department, reservations@example.com
- Level 1 reservations

In this example, the two sales agents should be assigned to the sales department and the agent in charge of scheduling and reservations should be assigned to the reservations department. Since no customer interaction would be expected for the CEO or the HR departments, no departments will be created for them. The billing role in a small company like this could be done through a billing department or through the existing sales department.

Reservations should not be a public department, so the administrator will configure SmarterTrack so that this department is not accessible to customers from the portal. By disabling this department from appearing in the portal, customers will not be able to submit new tickets or live chats directly to the reservations department. Instead, they will only be able to respond to emails sent to them from the reservations department.

To track data such as how customers heard about the company, the administrator should also set up custom fields. For example, the administrator may add a custom field called "Referrer" that displays in the default live chat and ticket templates and he may edit the template to ask the customer, "How did you hear from us?" The customer could then choose from options like "Magazine," "TV," etc. This custom data could be reported on later.

A Medium-sized Equipment Manufacturer

Company Info: This is a medium-sized manufacturer that has two different public brands. Brand ABC manufactures computer equipment and Brand XYZ manufactures copy machines. The company has 50 employees that handle customer service, product development, quality assurance, HR, and billing for both brands.

Reason for Adopting SmarterTrack: The company intends to use SmarterTrack to respond to customer service inquiries 24/7 via tickets and live chat. The company chose SmarterTrack because it could manage communications for both brands using the same installation.

Recommended Organization: In this example, the 50 employees that handle customer service, product development, quality assurance, HR, and billing for both brands should be set up as SmarterTrack agents. A good setup for the company would be the following:

- Customer service department, customerservice@example2.com
- Level 1 customer service
- Level 2 customer service
- Customer service management
- Product development department, productdevelopment@example2.com

- Group for each project
- Product development management
- Quality assurance department, qualityassurance@example2.com
- Group for each project
- Quality assurance management
- HR department, hr@example2.com
- Benefits
- Payroll
- HR management
- Billing department, billing@example2.com
- Level 1 billing
- Accounts payable
- Accounts receivable
- Billing management

The administrator should also set up both brands in SmarterTrack. In this example, each brand should have its own customer service department, as this will allow the company to assign agents to each brand.

Because the company's goal is to provide tickets and live chats 24/7, the company should require agents to login and out of the system each day and enable Round Robin distribution for agents. This will ensure tickets and live chats are distributed evenly among logged in agents.

The company may choose to use custom fields to gather additional customer data, such as a product or serial number, or search templates to provide automatic lookup of other data. The company may also use external providers to integrate their existing login system or to automatically escalate tickets from specific customers. Alternately, the events system can be used to perform this function.

Business Solutions

Education

In a classroom, teachers often utilize a variety of teaching methods to help students understand a particular subject. So why wouldn't educators and administrators apply that same concept to the way they communicate to the diverse communities they serve? With SmarterTrack, elementary to post-secondary educational institutions can quickly and efficiently provide support to parents, students, faculty, and staff.

Manage Student Affairs Through Tickets

- Allow parents to submit questions and concerns via email with trackable results by class, topic, semester, and more.
- Encourage teachers to submit tickets for assistance, support, maintenance, disciplinary follow-up, and more.
- Allow students to coordinate schedules with attendance tickets and provide class assignments by return attachment.
- Create an environment where classroom aids, teachers, professors, and administrators can transfer tickets among and between departments and teams.

Monitor Your School's Website Visitors

- Monitor your website and cultivate interest in prospective students by proactively inviting them to chat.
- Track where school website visitors originate and target recruitment efforts based on that information.

Enhance Communication Through Live Chat

- Offer personalized support to prospective students anywhere in the world with Live Chat.
- Expand office hours and efficiency by allowing students to access teachers during “Live Chat hours.”
- Create the feel of a virtual classroom by providing Live Chat capabilities to your Web-based curriculum.
- Offer individualized tutoring assistance to students and push relevant Web resources to them in real time.
- Decrease wait time for advisement sessions by providing students the ability to talk to counselors via Live Chat.

Interact with Students, Parents, Faculty, and Staff Through the Portal

- Use the Knowledge Base to give students immediate access to the latest information, including schedules, manuals, policies, student aid forms, video tutorials, and assignment tips.
- Give faculty and staff instant access to payroll information, internal documents, news items, and more.
- Give parents updates about school policies, parent/teacher conferences, holidays, events, and other important news.
- Allow parents to view student assignments in real time.
- Create Knowledge Base articles that address recurring problems and make them instantly accessible to help students to resolve their own issues.

Real Estate

Real estate and property management require the tight coordination of staff, dozens of vendors and contractors, and hundreds of customers (e.g buyers, sellers, and tenants). Each one requires follow-up and coordination to achieve success. SmarterTrack's complete solution is ideal for bringing productivity and efficiency to this dynamic and competitive environment.

Improve Seller and Buyer Communication with Tickets

- Allow buyers and sellers to submit requests and documents via trackable tickets to facilitate faster response.
- Assign project tickets to signage teams, contractors, and office staff to ensure task completion.
- Create reports for owners and sellers based on the types of inquiries for their respective properties and suggest ways to improve responses and interest with real data.

Use Events and Notifications to Monitor Work Flow

- Receive instant notification via email, text message, and/or desktop alert when an appraisal has been received, an inspection report has been completed, repairs have been accomplished, and more.
- Flag inquiries for specific properties and receive alerts to prompt faster responses.
- Create alert policies so that appraisals, written offers, and payoff letters are addressed before expiration.

Enhance Communication with Prospects, Landlords, Tenants, and Home Sellers via Live Chat

- Let potential home buyers and tenants ask simple questions in real time regarding the property that they are interested in.
- Encourage vendors and contractors to get quick answers and clarifications quickly via Live Chat and report and document those conversations.
- Create “virtual” open house events where prospects can view properties online and ask pertinent questions in real time.

Find Out Who is Looking at Your Properties Online

- Monitor your website and interact with prospects as they view specific property specifications and images.
- Push additional property information or alternative properties to site visitors as they browse.
- Geographically locate website visitors and tailor options based upon their neighborhood or location of interest.

Use the Portal to Deliver Information to Sellers, Buyers, Contractors, and Tenants

- Store standard information and common questions as searchable Knowledge Base articles, including: common terms, how to request repairs/service, who to contact, and more.
- Store standard agreements and forms online for easy download and reference.
- Use news items to highlight new or featured properties. Allow prospects to subscribe to receive the latest information as it is posted.

Advertising

Copywriters, design professionals, media buyers, sales teams, creative concept providers, and clients all interact in the dynamic world of modern advertising. Coordinating and tracking these complex communications and interactions is both more difficult and more important than ever before.

SmarterTrack is the perfect solution to manage these vital communication channels and deliver results to advertising organizations and their clients.

Improve Coordination and Assignments with Tickets

- Use trackable tickets to submit tasks to internal teams and external contractors. View the current progress/status of these tasks from any Web browser, anywhere in the world.
- Allow customers and contractors to submit requests and updates via tickets 24/7.
- Improve communication documentation by storing entire contact histories by task or project in one convenient, searchable interface.
- Track and report on subcontractor response and task completion times.

Monitor Work Flow and Guarantee Deadlines

- Send instant notifications via email, text message, and/or desktop alert upon a specific problem report, contact by certain customers, missed/approaching deadlines, and much more.
- Automatically alert senior staff regarding request workload and backlog by customer, project, department, and more.
- Notify sales and marketing teams regarding inbound requests from existing top-tier customers.

Turn Your Website into an Interactive Marketplace with Live Chat and WhosOn

- Allow prospects and contractors to ask basic questions in real time via Live Chat.
- Geographically locate website visitors and funnel leads to sales teams faster than ever before.
- Push additional Web pages and other content to visitors as you guide them through the site.

Deliver Relevant Information via the Portal

- Store standard information and common questions as searchable Knowledge Base articles on topics such as style guides, publication standards, specifications, deadline/submission calendars,

and much more.

- Store standard agreements and forms online for easy download and reference.
- Give customers and contractors world-wide access to step-by-step instructions for content submission.

Manufacturing

Contemporary manufacturing requires the coordination of dozens of staff members, multiple suppliers, sales teams, distribution channels, and sophisticated customer requirements. More than ever, manufacturing companies need powerful tools to manage these complex processes and deliver success. SmarterTrack is ideally suited to serve as the central hub for all communication channels to streamline operations and processes.

Improve Satisfaction and Response with Tickets

- Streamline service/support requests and ensure timely and accurate responses.
- Automatically transfer or escalate certain issues or product inquiries to specialized staff.
- Improve service/support request documentation by storing entire request histories in one convenient, searchable interface.
- Automatically search previous service/support requests and instantly display these potential solutions to your teams to reduce duplicated efforts.

Use Events and Notifications to Monitor Work Flow

- Send instant notifications via email, text message, and/or desktop alert upon a specific problem report, contact by certain customers, issue escalation, and much more.
- Receive notifications based upon SLA thresholds to ensure satisfaction.
- Automatically alert supervisors and management regarding workload and backlog.
- Notify sales and marketing teams regarding inbound requests from existing top-tier customers.

Turn Your Website into an Interactive Marketplace with Live Chat and WhosOn

- Allow prospects to ask basic questions regarding offerings while they are on the company website.
- Geographically locate website visitors and funnel leads to regional sales teams faster than ever before.
- Push additional Web pages to visitors to guide them through the site toward their solution.
- Allow experienced team members to monitor these interactions and coach or co-chat during these interactions to capture more opportunities.

Reporting for Efficiency, Quality Control, Marketing, and More

- Create custom reports of service/support requests by product, manufacture date, facility, and more.
- Identify defect reports by OEM supplier and/or part number.
- Use business intelligence reporting to pinpoint service costs to the product or virtually any other identifier.
- Identify new prospects and markets by service/information requests and report this information automatically to sales and marketing teams.

Deliver Product Information via the Portal

- Store standard information and common questions as searchable Knowledge Base articles, including: common terms, how to request service, MSDS information, specifications, and much more.
- Store standard agreements and forms online for easy download and reference.
- Record video “how to” and assembly instructions for easy and instant access 24/7.
- Use news items to highlight new or featured products and to distribute product updates. Allow customers and prospects to subscribe to receive the latest information as it becomes available.

Financial

Increased market competition, mergers and acquisitions, deteriorating credit quality, and the need for quick return on investments are forcing many financial institutions to seek new ways to drive revenue growth, increase customer profitability and limit credit losses. At the same time, revenue requirements and cost-cutting are forcing banks and other financial institutions to reach the bottom line with fewer resources. With SmarterTrack, financial institutions can capitalize on a cost-effective customer service solution that will ensure strong relationships between clients and employees.

Manage Your Clients' Banking Needs Through Tickets

- Allow customers to submit questions and concerns through email with trackable results by account, topic, and more.
- Offer website visitors seamless escalation to assisted service channels if initial questions are not answered.
- Create an environment in which tellers, loan officers, financial advisors, and bank managers can transfer Tickets for faster, more accurate responses.

Track Visitors on Your Financial Institution's Website

- Identify website visitors that indicate a propensity to open an account and target them with personalized assistance.

- Track visitors who reach your site via referring sites and treat them as hot leads.
- Gain valuable insight into online customer acquisition initiatives with detailed reporting on application completion rates, abandonment points, entry pages, and navigation paths.
- Use geographic mapping to alert specific branch offices of local interest.

Enhance Communication with Clients, Associates, and Employees Through Live Chat

- Foster long-term customer loyalty and satisfaction by providing online assistance and proactively satisfying client needs.
- Provide real-time answers and steer site visitors to the loan options that best meet their needs.
- Help visitors understand the process of debt settlement programs and supply information on legal options by providing instant access to financial advisors.
- Prequalify site visitors and guide them to products and services using push-page technology.

Improve Efficiency with Custom Reports

- Use business intelligence reporting to evaluate the cost-effectiveness of different loan programs.
- Create custom reports evaluating loan officer response time, the effectiveness of underwriters, the length of time it takes a loan to close, and more.

Interact with Clients, Associates, and Employees Through the Portal

- Use the Knowledge Base to give customers immediate access to the latest information, including interest rates, credit card offers, debt consolidation options, loan procedures, financial planning options, and ongoing promotions.
- Store standard agreements and forms online for easy download and reference.
- Give employees and associates instant access to payroll information, internal documents, and more through the Portal.
- Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients resolve their own issues.

Insurance

As insurance companies expand their traditional offerings such as home, auto and life insurance to include retirement planning, estate planning, and other financial services, cross-selling becomes crucial to the growth and success of the company. Because rates may vary only slightly, insurance providers must differentiate themselves through an integrated customer service approach. With SmarterTrack's complete customer service solution, insurers can quickly and efficiently provide superior service to clients, agents, and brokers.

Manage Claims and Communications Through Tickets

- Streamline operations and improve business process workflows by allowing clients, agents, and brokers to submit inquiries and rate quotes via trackable Tickets.
- Allow clients and agents to submit insurance claims and support documents via Tickets at any hour of the day.
- Improve claims documentation by storing entire communication histories in one convenient, searchable interface.

Monitor Your Company's Website Visitors

- Geographically locate website visitors and funnel leads to local agency offices faster than ever before.
- Track visitors who reach your site via referring sites and treat them as hot leads.
- Push additional insurance information, such as coverage clauses and rate tables, to website visitors as they browse.
- Enhance Communication with Clients, Agents, and Brokers Through Live Chat
- Foster long-term customer loyalty and satisfaction by providing online assistance and proactively satisfying client needs.
- Provide real-time answers and guide site visitors to the insurance options that best meet their needs.
- Help visitors understand estate and financial planning options or claims procedures by providing instant access to financial advisors and claims agents.

Improve Agent Efficiency with Custom Reports

- Identify new prospects and markets by claims or quote requests and automatically report this information to the appropriate agents.
- Create custom reports to evaluate claims by amount, type, neighborhood, policyholder, and more.

Interact with Clients, Agents, and Brokers Through the Portal

- Use the Knowledge Base to give clients immediate access to the latest information, including rate changes, policy offerings, payment schedules, discount eligibility, and more
- Give agents and brokers instant access to payroll information, internal documents, and more through the portal.
- Store standard agreements and forms online for easy download and reference.
- Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients and agents resolve their own issues.

Government

Government agencies typically provide a host of citizen contact points for a wide range of services. Whether searching for information on street repairs, community programs, or passports, finding the right department to address a citizen's concerns can be time-consuming and frustrating. Now more than ever before city, state, and regional governments are faced with the challenge of meeting increasingly complex operating requirements with fewer dollars and scarcer resources. Compounding this challenge are the increased expectations from citizens for easy access to information and world-class service levels. With SmarterTrack, government officials and employees can increase citizen satisfaction while also reducing costs and improving operational efficiency.

Manage Constituent Communications Through Tickets

- Allow new residents to set up services such as water and trash pick-up via trackable service tickets.
- Record, track, and escalate incoming issues to the appropriate individual or department, providing effective resolution to citizen inquiries the first time around.
- Process and track public information requests from residents and news media.
- Give citizens around-the-clock access to check the status of tickets and service requests.

Monitor Your Company's Website Visitors

- Track where website visitors originate and target tourism efforts based on that information.
- Identify trends and target outreach campaigns that best meet constituent needs.
- Gain valuable insight into resident behaviors and interests, and use that information to identify and pursue economic development opportunities within in your community.

Improve Employee Responsiveness and Constituent Relationships Through Live Chat

- Allow residents to ask questions about government programs and services in real time.
- Create virtual town halls and allow constituents to chat with elected officials about pertinent issues in real time.

Increase Citizen Access and Improve Service Through the Portal

- Use the Knowledge Base to provide residents with information about government programs and services, including code compliance guidelines, council and board meeting minutes, recreation and special interest classes, and office closures due to government holidays.
- Facilitate discussion between residents, government officials, and staff with online forums.
- Store standard forms online for easy download and reference.
- Create Knowledge Base articles that address recurring problems and make them instantly

accessible to help constituents resolve their own issues.

- Encourage residents to stay informed by subscribing to news items via RSS feeds.

Travel

Companies in the travel and hospitality industry are operating in increasingly complex and competitive environments, and often the only way these companies differentiate themselves is on the consistency of their brand in terms of service, customer experience, price, value, and convenience.

With SmarterTrack, airlines, travel agencies, and hotels can increase online booking and earn customer loyalty by providing better customer service and streamlining day-to-day operations.

Manage Inquiries and Bookings Through Tickets

- Allow customers to submit booking requests and concerns via trackable tickets to facilitate faster response.
- Automatically transfer travel requests or destination inquiries to the appropriate agent(s).
- Improve communication documentation by storing entire contact histories in one convenient, searchable interface.

Monitor Your Company's Website Visitors

- Track visitors who reach your site via referring sites and treat them as hot leads.
- Identify website visitors that click on high-value pages—such as those featuring convention space, wedding halls or information on room blocks—and invite them to chat or speak with a site representative.
- Track where website visitors originate and target marketing efforts based on that information.

Increase Bookings and Enhance Communication Through Live Chat

- Offer personalized support to prospective travelers anywhere in the world with Live Chat.
- Help travelers find deals and vacation packages by pushing relevant pages to them.
- Resolve booking or trip-search problems in real time.

Interact and Provide Up-to-date Information to Travelers Through the Portal

- Use the Knowledge Base to give travelers immediate access to the latest information, including booking policies, government-issued travel advisories, required travel documents, featured destination profiles, and general travel tips.
- Highlight featured destinations or vacation packages with news items and encourage customers to subscribe to receive the latest information as it becomes available.
- Facilitate communication through forums and encourage travelers to interact and share their experiences or sightseeing suggestions.

Types of Users

There are two primary types of people that will use your SmarterTrack installation:

- Users (customers and/or end users) will use the portal to search for information in the Knowledge Base, start tickets or initiate live chats with company representatives. Because one of the goals of SmarterTrack is to enable users to use self-service resources to find solutions to issues before using a more expensive form of support, end users can create an account for portal access by default.
- Employees (agents) will use SmarterTrack's management interface to interact with users and set up all aspects of the system. Any employees that will communicate with customers or end users via email, tickets or live chats should be added as agents in SmarterTrack. Unlike users, agents must be created by an administrator and be given the role of "agent" so they can access the management interface and interact with users.

Users

Each individual that visits your portal or sends an email to your company is considered a user.

Because all users are assigned roles, which define permissions and dictate which features the user has access to, companies can restrict a user's access or ability to perform certain actions. Depending on the user's role, companies can:

- Allow only certain types of users access to parts of the Knowledge Base.
- Allow only registered users to submit tickets or start live chats.
- Configure custom icons (custom links) on the homepage of the portal to only show for certain types (roles) of users.

Generally, companies will require users to login to the portal before they can perform such functions. However, administrators can configure SmarterTrack to hide the concept of logging in from customers by allowing anonymous access to certain functions.

Agents

Each employee that accesses SmarterTrack's management interface is considered an agent. Because SmarterTrack tracks, documents and reports on all customer communications and agent actions, it is important that every agent has his/her own account and login. This will ensure proper reporting and auditing and avoid confusion.

Some of your agents, such as your support/sales staff, may be full-time SmarterTrack users. These agents will spend the majority of their time actively working in the management interface, watching tickets and responding to live chats.

Other agents, such as your development staff or managers, may be part-time SmarterTrack users. Generally, these agents will login to SmarterTrack once or twice a day, or when needed. To ensure these users receive immediate notification when new Tickets or other events occur, SmarterTools recommends that they use SmarterNotify . In addition, agents can set up Events that will notify them when a new ticket is assigned to the, when a follow-up comes due or when a user replies to a ticket.

Agents needing supervisory access to the SmarterTrack system should be assigned the "manager" role. This will allow them to manage and view other agents' tickets and live chats.

Understanding Active Groups

One key factor in using SmarterTrack efficiently is understanding an agent's status and the groups each agent is active in. Each agent will either be actively participating in a group or not. That is, they will either be active or inactive in each group. When an agent is active, they can be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. An inactive agent cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. Note: an agent can be logged in to SmarterTrack but not active in any groups.

In order for a ticket or live chat to be assigned to an agent, the agent must be logged in to SmarterTrack, they must be part of the group the ticket or chat is for, and the agent's status must be set to active so they can receive tickets and/or live chats for the corresponding group. It is important to note that agents and managers **MUST** be part of a group in order to interact with any communications within that group, including tickets and live chats. This includes the ability to search tickets, view tickets in the group's queue and more. If an agent isn't a member of a particular group, regardless of their role, they will not have access to any communications for that group.

If all agents are either logged out or if there are no active and available agents, any tickets or live chats will be directed to the queue and they will sit there until agents log in and become active or until an agent cherry picks the ticket or live chat from the queue. (For more information on cherry picking, see the ticket distribution explanation for setting up a Group .) For this reason, training agents to check their status upon logging in or prior to logging out is critical to the company's success.

For information about how organizations can monitor the status of their agents, see the KB article [How To Monitor Agent Status](#) .

Understanding Tickets

Many organizations have adopted simple email solutions for keeping track of their customer interactions, and such solutions may have their place when dealing with one or two replies in a relative brief amount of time (hours) and/or when individual agents manage the entire process. However, these

simple mail solutions become less and less effective with complexity--the more agents, transfer opportunities, consultations, and time involved, the more prone these systems are to fail in the delivery of good customer service:

- Emails get "lost" and/or filtered
- Email is subject to deletion and mis-filing
- Responses that have longer idle times can be buried under less important mail
- Internal comments and notes cannot be kept private
- Conversation threads are difficult to manage and can become too long
- Escalations can cause emails to be unanswered or delayed unnecessarily
- Reporting on the effectiveness of customer service and support is nearly impossible
- Supervisor tracking of issue in problematic
- It can be impossible to associate other communications channels (live chats, Knowledge Base articles, etc.)
- Locating incident histories is time-consuming or impossible

The consequences of a lost, misdirected, or mishandled service request can be serious. Customers expect fast response times and standard email communication is not designed to satisfy this requirement. It is clear that email alone is not adequate.

SmarterTrack includes an advanced ticket system that is designed to transcend the limitations of simple email solutions:

- Agent views include all internal comments, notes, histories, and more
- Resolutions of previous similar incidents are available to agents
- Custom fields and other display items keep all relevant information together and easily accessible to agents
- Detailed agent-level reporting increases performance metrics
- Collapsible communication elements make organizing and managing ticket data easy
- Events can be created to allow tickets to be flagged, escalated, or redirected if time-sensitive SLAs are not met or based on other parameters

Transitioning from Email to Tickets

Transitioning to SmarterTrack from an existing email service solution is relatively easy. SmarterTools provides converters for certain email-based solutions to speed migrations. For those email solutions that do not have converters made for them, POP can be utilized to send the email messages into the SmarterTrack ticket system.

For a more gradual solution, SmarterTrack can be run in tandem (concurrently) with the email solution. New service and support requests can be directed into SmarterTrack and existing tickets can

be managed via the email-only solution. Over time the process should naturally fall entirely into the SmarterTrack system. Customers will still interact with agents via their email, but agents will enjoy the SmarterTrack Web interface and the additional functionality of the program.

More Communication Options Available

This is not to say that email clients cannot or should not be used by agents. Quite the contrary. With SmarterTrack, companies can configure several scenarios that allow customers to submit service requests via the portal, via email, through third-party applications via Web services, or any combination of these. Agents can reply to these service requests through the Web interface, email, or Web-enabled mobile devices. Regardless of the information delivery method, all communications are logged in the SmarterTrack system and all of the features and functionality are available to track, record, monitor, and report on these items.

Harnessing the Power of Tickets

The full efficiency of SmarterTrack tickets is gained by harnessing several important feature sets:

Resolutions

Agents can enter resolutions into existing and closed tickets. As new tickets arrive, SmarterTrack automatically searches for previous tickets that have been successfully closed with similar topics and displays them in the Resolutions tab. This tab also has a search field that can be used to customize and narrow searches, which helps agents mine existing data.

Searches

Agents can search for existing and previous tickets with advanced searching by string, email address, customer name, date and time, handling agent, ticket number, and more. This powerful search functionality greatly speeds the delivery of service.

Attachments

Files and images can be attached to both inbound and outbound messages to speed issue handling and to treat these attachments as important communication points that can be referenced later from within the ticket. This means that files and images no longer need to be stored in a separate place, eliminating the potential that such files are lost or mishandled. This also means that multiple attachment items are kept in chronological order, so agents always know which received files are the most current.

Comments/Notes

Internal comments and notes can be typed in line--maintaining chronology with customer

communications and providing additional context, documentation of voice communications, and details to other agents who may need to handle the issue.

Events and Notifications

Events can be configured to perform automated actions (transfers, escalations, special responders, etc.) or to provide specific notifications to agents and managers via SMS text message or email.

Transfers and Escalations

Escalations and transfers can be managed automatically or manually. Utilizing the events system, automatic escalations and transfers can be accomplished based upon time, idle wait, number of replies, topic, language, brand, keyword, or any number or combination of items.

Custom Fields

Custom fields can be utilized to be auto-populated through external providers. Customers and agents can also be required to ensure that certain fields are filled with relevant data before a ticket can be submitted or closed, respectively. This kind of data can be instrumental in providing the kinds of specific information that can save hours of research--speeding resolutions and increasing satisfaction. Custom fields also provide the opportunity for enhanced reporting based upon those fields.

For example: Requesting the product name and version/edition or a product prior to the customer launching a ticket may not seem too onerous a requirement from the customer's perspective and can deliver that information to the agent, meaning that this agent may not have to access a separate application to look up the customer account prior to starting his response. This information can also be used to customize auto-responders and displayed suggestions which may have a better chance of serving accurate options. Valuable back-and-forth time is greatly saved. Additionally, managers and supervisors now have the ability to report on these custom fields, gaining valuable insight to agent performance relative to product and version and perhaps detecting service trends that can push value information to development teams and manufacturing floors.

Related Items

It is not uncommon for there to be multiple communications from a customer on one or similar topics. Losing track of those communications can add extra work and waste time needlessly. Tickets can be associated to other tickets and live chats so that all of the details are accessible to agents in context and in real time. Associated items can be easily and quickly viewed in the Related Items tab within the ticket.

Reports

Ticket reports can be invaluable. Cost analysis reporting based upon product, agent, department, custom fields, and literally hundreds of other items and combinations can help managers determine the true relative costs. Summary and trend reporting by product, department, ticket type, and more can help companies spot trends, identify training needs, and manage for improved performance.

Understanding Live Chat

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, capture information on website visitors, and assist more customers concurrently. A more cost effective service channel than telephone, live chat maximizes resources by supporting concurrent sessions. Instead of handling one call at a time, your customer service agents can manage several chats at once.

Live chat is also an easy and effective way to generate sales. By providing your website visitors the opportunity to ask questions before, during, and after the buying process, your employees can explain product options, cross-sell, and upsell orders.

Real-time Typing

Agents can use live chat's real-time customer typing feature to prepare a response or look up relevant resources while the customer is typing to ensure speedy and accurate responses.

Coaching and Co-chat

SmarterTrack's coaching and co-chat features allow organizations to facilitate training and ensure the accuracy and efficiency of employees. For example, managers can proactively address issues by monitoring live chats in real time and offering assistance when needed--either by coaching an agent while he is engaged in a live chat or by participating simultaneously with the agent in a live chat.

Live Chat Translation

Businesses with multi-lingual employees can automatically route live chats in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multi-lingual employees can use the live chat translation feature to allow all agents to respond to chats in nearly every language.

For more information regarding live chat translation, refer to the KB article [How To Automatically Translate Live Chats](#) .

Understanding Who's On

When referring to websites, we often use terms like "virtual storefront" and "shopping cart" to describe the way customers interact with our sites and our business in general. But real brick and

mortar businesses have an advantage over online businesses in that they can see what customers are doing in real-time as they interact with store displays, products and employees. In these real stores, service people can see when a customer is confused by options, can answer questions and provide advice quickly, and can assist with the final transaction in the "now." Previously, internet businesses have only had analytics to tell them about such interactions in the virtual world. Web analytics — although exceptionally useful — usually only tell you what has happened in the past, perhaps after the customer has already left your site. Who's On has been created to bring the advantages of real-time customer interactions to the online environment.

The Virtual Shop

Think of Who's On as real-time analytics where employees/service agents can "see" a customer's progress through the site, regardless of whether that customer is only finding information or proceeding through the sales path to a completed transaction. The Who's On features in SmarterTrack allow you to virtually follow that customer from page to page, seeing where they spend the most time and what pages they go back to. It also allows you to notice and report on literally dozens of items about that customer.

Use with Live Chat to Increase Sales

When used with SmarterTrack's included live chat feature, agents can either push or invite an individual site visitor to a live chat. Imagine that an agent notices a customer returning again and again to a specific page on the site. This could indicate that they need more information on that topic or are not finding what they are looking for. Agents can "virtually approach" these customers and offer help, additional resources and advice. If a potential customer is "stuck" on an ordering page, agents can assist in the finalizing of the transaction in a friendly, unobtrusive way.

Visitor Broadcasting

Who's On also keeps track of all site visitors simultaneously and can allow site owners to display broadcast messages to all visitors at the same time. This can be perfect for periodic promotions and for displaying service messages such as site maintenance prior to service interruptions.

Visitor Surveys

When used in conjunction with SmarterTrack's onboard survey system, individual customers can be given surveys based upon the time they spent on your site, the specific pages visited or whether or not they completed a transaction. This provides a unique and powerful channel to gather real-time customer-related business intelligence about why the decision was made to buy a product or to move on. The possibilities are truly limitless.

To learn how to incorporate Who's On into your website, refer to the KB article [How To Configure Who's On to Track Visitors on your Company's Website](#) .

Understanding the Knowledge Base

The Knowledge Base is a tool companies can use to share information with employees, customers, and partners. In its simplest form, SmarterTrack's Knowledge Base is an online repository of articles that helps agents and customers solve issues quickly and efficiently.

A well-organized Knowledge Base can save organizations money by decreasing the amount of employee time spent trying to find information about company products, policies, and/or procedures. As a customer service tool, the Knowledge Base is one of the most cost-effective support channels because it gives customers easy access to information that would otherwise require contact with the company's staff.

Of course, the effectiveness of the Knowledge Base is dependant on the company's ability to create, edit, and review its articles on a regular basis. SmarterTools suggests running regular reports to determine how often your customers access specific articles; which topics/products/etc. your customers are seeking help on; and which article searches returned no results. These reports are valuable because they can be used to identify deficiencies in Knowledge Base content.

Organizing the Knowledge Base by Brand

With SmarterTrack's branding feature, companies can assign articles to one or multiple brands. This allows companies to only display the articles that relate to a specific brand, eliminating the customer's need to weed through erroneous information.

For example, a software company with multiple products may have separate websites for each product. By assigning Knowledge Base articles to different brands (products), the company can ensure that only the articles relating to a specific product are displayed to the customer.

Using the Knowledge Base with Tickets and Live Chats

When customers complete the ticket submission form, relevant Knowledge Base articles and resources are automatically displayed as possible solutions to their inquiry as part of the ticket submission process. This is also true when customers initiate live chats with a department. As a result, your customers may receive answers to their issues before they've finished filling out the ticket--ultimately saving your company valuable time and money.

Similarly, when an agent is participating in a live chat with a customer or responding to a ticket, SmarterTrack uses the text of these conversations to actively search the Knowledge Base for applicable articles. By automatically displaying possible solutions from the Knowledge Base to agents,

SmarterTrack helps companies ensure that their customers receive timely and accurate responses to their inquiries.

Using the Knowledge Base as a Marketing Tool

SmarterTrack's Knowledge Base takes companies into the next generation of information delivery with the ability to insert video, code block, and other special features into articles. By incorporating multimedia and search engine optimization strategies into Knowledge Base articles, companies can transform their Knowledge Base content into a valuable marketing tool.

Marketing benefits include:

- Knowledge Base articles are search engine optimized and will display in search engine result pages, allowing competitors' customers to discover your company as they seek answers to their own questions.
- Utilizing the Knowledge Base can improve your company's overall SEO strategy by helping you build links and improve Google PageRank.

By incorporating SEO strategies into our own Knowledge Base, SmarterTools has successfully topped search engine results for a variety of searches. For example, the SmarterTools KB article "Where are My IIS Log Files Stored?" currently ranks no. 1 for the search phrase "IIS log files." As a result, that article has received more than 24,000 views and is our most popular article to date.

Understanding Multi-language Support in SmarterTrack

In a global economy and marketplace many companies face challenges disseminating information to customers in several languages while controlling costs. While the ideal solution may be to have multi-lingual speakers in every service department to effectively help customers around the world or to hire human translators to translate every Knowledge Base article, such solutions usually are not feasible nor cost-effective.

With support for nearly 60 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Multi-language support is provided through:

- Language packs
- Translatable strings
- Live chat translation
- Online help translation For step-by-step instructions on configuring the SmarterTrack interface to support multiple languages, please refer to the KB article [How To -- Set Up SmarterTrack to Support Multiple Languages](#) .

Language Packs

Language packs are used to translate the SmarterTrack interface into another language and can be downloaded from the SmarterTrack Download page.

Translatable Strings

Some phrases and words may not be available for translation through a specific language pack. When this happens, administrators can use translatable strings to define these phrases and words. For example, a U.S. company with customers in Spain may create a translatable string to translate the company's department names (billing, sales, etc.) into Spanish (facturacion, ventas, etc.).

Live Chat Translation

Businesses with multi-lingual employees can automatically route live chat in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multi-lingual employees can use the live chat translation feature to allow all agents to respond to chats in nearly every language.

For more information regarding live chat translation, refer to the KB article [How To Automatically Translate Live Chats](#).

Defining Workflows and SLAs

Although SmarterTrack doesn't have specific settings pertaining to SLAs or workflows, its event-driven architecture makes defining SLAs and workflows easy and efficient.

Using the events system, managers can configure events at the system and user levels and set up automated actions based on those events to ensure employees are meeting SLAs and staying on top of their workflow. For example, the events system can be used to:

- Ensure customer satisfaction with quality control related events based upon time and/or content.
- Bring secondary groups or individual agents on line when load or wait times exceed company standards.
- Automatically escalate tickets when the number of responses or idle time reaches certain parameters.

Similarly, agents can use the events system to ensure they are responding to tickets in a timely manner by configuring an event action that notifies them when they receive a new ticket or when a customer responds to a ticket.

In addition, SmarterTrack's task management system allows agents and managers to proactively manage the workflow process while improving organization, efficiency and productivity. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to add related tickets, live chats and call logs to any task in the system. This ability ensures agents can have all the information necessary to complete a task in one convenient location. To help agents meet business deadlines, SmarterTrack also allows agents to configure reminders and events based upon each task.

Understanding Single Sign-On

Rather than asking customers to use a different set of credentials to log into your support portal, automatically log customers into your website using the same credentials they use on other websites. Single Sign-On (SSO) allows the login credentials on an external site to be shared with the SmarterTrack portal, so navigation between your website and portal remains seamless.

SmarterTrack's implementation of Single Sign-On uses the login external provider to create users and manage logins. This allows a user account on your primary site (www.example.com) to apply to the SmarterTrack portal (portal.example.com). For example, if a user created an account on your website that allowed them to purchase items in the shopping cart, that username and password, along with any applicable account details, are carried over to the SmarterTrack portal.

For more information on implementing Single Sign-On, see the KB article [How To - Configure Single Sign-On Between SmarterTrack and Another Site](#)

Installation and Deployment

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.

SmarterTrack System Requirements

SmarterTrack was designed to operate efficiently in shared, VPS or dedicated environments without any loss in functionality or performance based on the following minimum requirements:

- Windows 7, Windows 8** or Windows Server 2008 or higher, including Windows Server 2012**
- Microsoft .NET 4.0 running in full trust
- SmarterTrack Web server included with product*
- Microsoft SQL Server 2005 or higher, Microsoft SQL Server Express Edition or MySQL 5.1 or higher Note: At this time, MySQL 5.5.14 is the only version not compatible with SmarterTrack.

However, below are the SmarterTools recommended requirements :

- Windows Server 2008 R2 or higher
- 64-bit version of Windows Server is strongly recommended
- Microsoft .NET 4.0
- Microsoft IIS 7.0*
- Microsoft SQL Server 2008 R2 or higher

Note: Each installation and environment is unique. Extra load caused by excessive tickets, chats, agent accounts, and/or other factors may require more disk space, memory, database allocation, etc. than suggested in the online help. No warranty or guarantee is expressed or implied as to the efficacy or viability of these recommendations for a particular environment or application.

*SmarterTrack includes a basic Web server, so the product is fully functional upon installation—even without the existence of IIS or other Web servers. However, SmarterTools recommends installing Microsoft IIS 7.0 in place of the SmarterTrack Web server for increased performance and security in medium to high-volume environments. For more information, see [Running SmarterTrack as an IIS Site](#) .

***Only the most current versions of SmarterTrack (8.4 or higher) were tested on Windows 8 and Windows Server 2012. Previous versions may install on Windows 8 and/or Windows Server 2012 and run. However, some work arounds may be necessary to get them to run well. See the SmarterTools knowledge base for more information.

Installation

SmarterTrack is available as a traditional software installation or as a hosted service. Businesses that choose the traditional deployment of SmarterTrack can install the software onto a local or co-located server in dedicated, VPS, and shared environments using the standard install download. Note: Administrators planning to deploy SmarterTrack with failover functionality may have special considerations to make regarding installation. For more information, see [SmarterTrack Failover Functionality](#) .

Installation on a Dedicated Server

Please refer to the KB article [How To - Install SmarterTrack on a Dedicated Server](#) for step-by-step installation instructions for this environment.

Installation to a Shared Server

Please refer to the KB article [How To - Install SmarterTrack to a Shared Server](#) for step-by-step installation instructions for this environment.

Installation to SmarterTools Servers

Customers using SmarterTrack.com will have access to the program shortly after activating a free trial or purchasing a paid subscription. Because SmarterTrack is already installed on servers owned and maintained by SmarterTools, hosted service customers do not need to worry about installation. However, they will need to follow the instructions provided in their welcome emails to activate and set up their hosted service.

Running as an IIS Site

By default, SmarterTrack installs a basic Web server that allows companies to start using the application immediately after installation. However, SmarterTools recommends moving to a more robust and secure Web server, such as Microsoft IIS. For step-by-step instructions on configuring SmarterTrack to run with Microsoft IIS 7.5, please refer to the KB article [How To - Set Up SmarterTrack as an IIS Site](#).

Note: This help topic assumes familiarity with Microsoft IIS and how it works. SmarterTools recommends using the basic Web server included with the SmarterTrack if you are unfamiliar with or uncomfortable using Microsoft IIS.

Setting Up the Database

SmarterTrack needs a database to store data. SmarterTools customers using an installed version of the software can run SmarterTrack with any of the database servers listed below. Note: SmarterTrack will only prompt you to automatically create a database if it does not already exist and you are connecting to a Microsoft SQL Server. In order to set up SmarterTrack with MySQL, the database will need created manually before starting the Setup Wizard.

Microsoft SQL Server (Express, Web, Standard, or Enterprise)

Microsoft SQL Server is the recommended database to use for SmarterTrack. Express Edition is available at no cost and will support the vast majority of SmarterTrack customers. For those needing advanced services or large amounts of database storage, Web, Standard or Enterprise Editions are recommended.

Microsoft SQL Server 2005 and later are supported, but for best performance, it is recommended to use Microsoft SQL Server 2008 R2 or later. If possible, use of 64-bit is also recommended.

For more information or to download SQL Server, please see:

- [SQL Server Product Information](#)
- [SQL Server Express Download](#)

For best results, when downloading and installing SQL Server, choose the Database With Tools download and install Management Studio Express with the database.

MySQL

MySQL can be used as a back-end database for SmarterTrack. MySQL Community Server can be

freely downloaded and used for most customers. For those needing advanced service and support, MySQL offers a paid Enterprise Edition.

MySQL versions 5.1 and later are supported, but it is recommended to use 5.5 or later if possible. In addition, use of 64-bit is recommended. Note: At this time, MySQL 5.5.14 is the only version not compatible with SmarterTrack.

For more information or to download MySQL Community Server, please see:

- [Product Information](#)
- [MySQL Community Server Download](#)
- [MySQL Workbench](#)

SmarterTrack will only support the InnoDB database engine and will attempt to use InnoDB for all upgrades and new installations. For information on converting a database to InnoDB, see the KB article [How To Convert from MyISAM to InnoDB](#)

Additional Information

Please refer to the KB articles [How To Set Up the SmarterTrack Database on a Dedicated Server](#) or [How To - Set Up the Database for Shared Hosting](#) for step-by-step instructions and more information regarding the database backend.

Activating SmarterTrack

In order for SmarterTrack to function for more than one agent, the product must be activated using a valid license key. In addition, if SmarterTrack is moved to another server or assigned to a different database, the product may need to be reactivated.

To access the product activation wizard, click the settings icon . Then expand the System Settings and Activation folders in the navigation pane and click Licensing . The edition, version, and license level information for the version of SmarterTrack currently being used will load in the content pane.

To activate or reactivate a valid license key, click Activate Key in the content pane toolbar. For step-by-step activation instructions, please refer to the KB article [How To Activate SmarterTrack](#) . Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request.

Upgrading SmarterTrack

Because the SmarterTrack download contains all of the installation files needed for any licensing level or edition, upgrading editions or levels is relatively easy. With a valid license key, companies can

easily upgrade to the Professional or Enterprise editions or increase the number of agents available in SmarterTrack. For more information, see [Licensing](#) . For step-by-step instructions, please refer to the KB article [How To - Upgrade SmarterTrack Levels and Editions](#) .

The steps for upgrading to SmarterTrack from an older version of the application vary depending on which installation package is used--the automatic installation package or the manual installation package. For more information, please refer to the KB article [How To - Upgrade SmarterTrack](#) .

SmarterTrack Failover Functionality

Who Should Use This

This document is intended for use by system administrators that want to ensure maximum uptime of the SmarterTrack help desk. It provides architecture recommendations and considerations for deploying SmarterTrack in a failover environment. Note: Failover requires activation of SmarterTrack Enterprise with Failover Functionality. For licensing information for this product, contact the SmarterTools Sales Department.

Failover Overview

SmarterTrack Enterprise with Failover Functionality allows organizations to decrease the likelihood of service interruptions and virtually eliminate downtime by installing SmarterTrack on a passive failover server that is always connected to the database in standby mode. For businesses that use their help desk as a mission-critical part of their operations, failover functionality ensures the help desk remains online if there is a primary server failure.

Understanding How Failover Functionality Works

The main components of failover functionality are a primary server that acts as the default SmarterTrack server and manages the licensing of the server cluster and a secondary server that remains connected to the database in standby mode until the primary server experiences problems with network access or system hardware.

If the primary server fails, SmarterTrack will automatically enable the secondary server to active status. When this occurs, the secondary server takes over responsibility for processing background threads and supporting Web interface functionality. This server will remain in active status until another failure occurs or the system administrator manually changes the server status to passive.

SmarterTrack Database Server

System administrators have two options for setting up the SmarterTrack database in a failover deployment:

- The SmarterTrack database can be installed and configured on a single database server. Choosing this option means that there is a single point of failure; if the database server fails, SmarterTrack will go offline. In most cases, this setup is sufficient.
- For additional stability, the SmarterTrack database can be installed and configured on a clustered database server. Choosing this option means that multiple servers in the database cluster need to fail before SmarterTrack will go offline. If a clustered database is desired, the implementation, licensing and deployment of that cluster should be performed under the direction of a database administrator with related experience.

Regardless of the option chosen, it is important that all SmarterTrack servers can connect to the database(s) using the same connection string.

SmarterTrack Data Storage

It is important that every server in the failover cluster has access to the same set of physical files. For this reason, SmarterTools requires storing the SmarterTrack data files on a shared drive using iSCSI or a similar solution. Implementation is discussed in the steps to set up the primary and secondary failover servers (below).

For more information, refer to the knowledge base article [How To – Store SmarterTrack Files on an Alternate Drive or SAN](#).

Setup of the Primary Server

Follow these steps to configure the primary server in the failover cluster:

- Download the SmarterTrack installation file from the SmarterTools website.
- Run the InstallShield Wizard.
- If you are installing SmarterTrack on a dedicated server, please refer to the knowledge base article [How To – Install SmarterTrack on a Dedicated Server](#) for step-by-step installation instructions for this environment.
- If you are installing SmarterTrack on a shared server, please refer to the knowledge base article [How To – Install SmarterTrack to a Shared Server](#) for step-by-step installation instructions for this environment.
- Set up the SmarterTrack database. For more information, see the SmarterTrack Database Server section of this document.
- Configure the server to store SmarterTrack data files on a shared drive. For more information, see the SmarterTrack Data Storage section of this document.
- Set up IIS. For more information, refer to the knowledge base article [How To – Set Up SmarterTrack as an IIS Site](#)

- Log in to the SmarterTrack management interface as the primary administrator (if you are not logged in automatically). By default, the username is “admin” and the password is “admin.”
- Run the Database Connection Wizard.
- Run the Company Setup Wizard to begin setting up your company's agents, groups, departments, and brands.

Setup of the Secondary Server

Follow these steps to configure the secondary (passive) server in the failover cluster:

- Install SmarterTrack on the secondary server.
- Set up IIS on the secondary server.
- Configure the secondary server to store SmarterTrack data files on the same shared drive as the primary server. For more information, see the SmarterTrack Data Storage section of this document.
- Log in to the SmarterTrack management interface as the primary administrator (if you are not logged in automatically). By default, the username is “admin” and the password is “admin.”
- Click the settings icon .
- Expand the System Settings and Setup folders and click Clustering in the navigation pane. Any servers on which this license of SmarterTrack has been activated will load in the content pane. To identify which server is the secondary server, look at the Status column. Any secondary servers will be listed as passive or disabled status.
- To enable the secondary server to act as a backup in the event the primary server fails, select the secondary server and click Enable in the content pane toolbar. The status of the secondary server will change to passive.

Note: Access to the portal is disabled on passive or disabled servers because issues can arise from two systems functioning simultaneously. To access the clustering settings on a passive or disabled server, go to [http://\[yourSmarterTrackURL\]/login.aspx](http://[yourSmarterTrackURL]/login.aspx) and log in as the primary administrator. Only the settings area of the management interface will be available.

Manually Activating a Failover Server

In the unlikely event that the automated failover process fails, system administrators can manually designate a server as the active server in the failover cluster. There are two methods to manually activate a failover server:

- Log in to the SmarterTrack management interface and click the settings icon . Expand the System Settings and Setup folders and click Clustering in the navigation pane. Select the desired server and click Set Active in the content pane toolbar to make the server the active server.

- Go to [http://\[yourSmarterTrackUrl\]/ActivateNode.aspx](http://[yourSmarterTrackUrl]/ActivateNode.aspx) on the server you wish to make active. Click the Activate Node button to make this server the active server.

These changes will be implemented within five seconds. Note: For security purposes, it is recommended that you restrict access in IIS to the “activatenode.aspx” page so that it cannot be accessed from outside networks .

Modifying Failover Servers

System administrators can add, delete or modify the status of a failover server at any time. Log in to the SmarterTrack management interface and click the settings icon . Expand the System Settings and Setup folders and click Clustering in the navigation pane. Then make any necessary modifications.

SmarterTrack External Providers

Who Should Use This Document

This document is intended for internal developers looking to extend or customize the functionality of SmarterTrack’s login system or ticket and live chat submission process. SmarterTrack users should note that the use of external providers is an advanced feature that requires programming knowledge.

External Providers Overview

SmarterTrack was built with custom configuration and integration in mind. In addition to being able to automate SmarterTrack via Web services, developers and/or system administrators have the ability to extend the functionality of the application through the use of external providers (third-party Web services). By integrating external providers into SmarterTrack, companies can integrate their login system to LDAP, show/hide custom fields based on the department a user chooses, populate fields, run reports based on externally provided information, and more.

In order for your external provider to work in SmarterTrack, the Web service(s) need to follow a specific interface. The external providers discussed in this document utilize the following interfaces:

- IExternalLoginProvider
- IExternalCustomFieldProvider
- IExternalTicketProvider
- IExternalChatProvider
- IExternalUserInfoProvider
- IExternalEventProvider

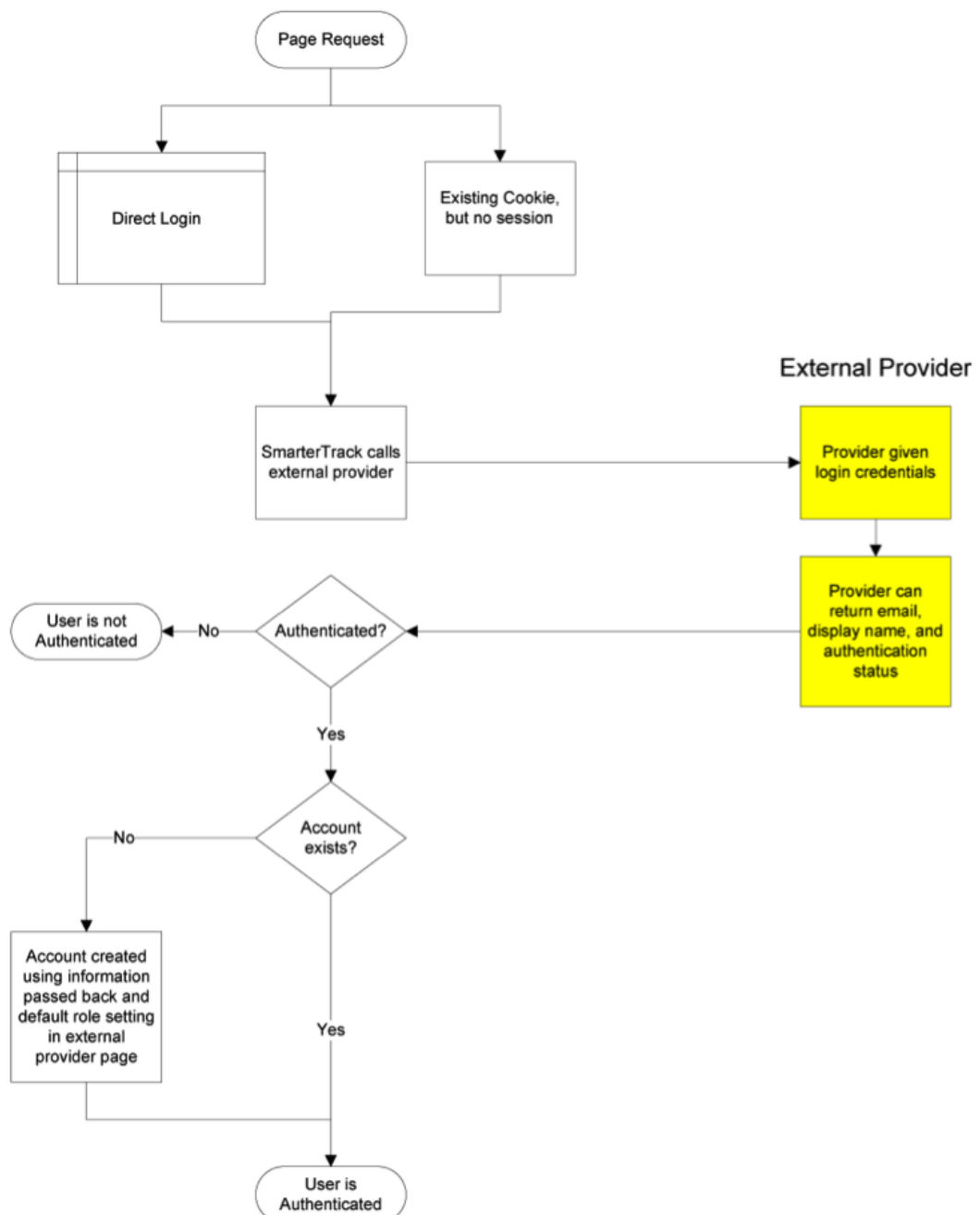
Multiple external providers can be created in the same Web service as long as the required interfaces are inherited. The interfaces needed for these external providers can all be found in the

SmarterTrack.Connector DLL. This file may be included in and distributed with your installation package.

the steps required to set them up, and an example on how to set up each Web service call.

Login Provider

The login provider allows you to customize SmarterTrack's login process. You can change the way users are authenticated in the system, create new users for unregistered logins, and even use cookies from other websites to allow for single sign-on. The login provider utilizes the IExternalLoginProvider interface. For a better understanding of how the login provider works with SmarterTrack, please refer to the flow chart below:



Authenticate Method

The authenticate method validates the username and password for access to the system. This call is made when a user attempts to log in through the portal without any existing authentication cookie.

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The username you are authenticating with
- LoginPassword :The password you are authenticating with
- Return Type :ExternalLoginProviderResult
- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)
- Authentication :Determines whether or not the authentication check succeeded. Possible values are OK or FAIL
- EmailAddress :The email address of the user
- DisplayName :The display name of the user

cf_* :The value of current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. These custom field values will be assigned to the user who is logging in. If the provided custom fields do not exist, the value is ignored.

Here is an example of how the authenticate method is used:

```
// This function is used to authenticate user credentials when they login
to the interface. // The return values are used to create and link an
account from SmarterTrack into your system. // // // Inputs // authPW =
Validates that calling software is valid // loginUsername // loginPassword
// Outputs // Authentication = OK or FAIL // EmailAddress = Email address
of user // DisplayName = Display Name of User [WebMethod] public
ExternalLoginProviderResult Authenticate(ExternalLoginProviderInputs
inputs) { ParsedLoginInputData iData = new ParsedLoginInputData(inputs);
ExternalLoginProviderResult result; // Verify that all necessary criteria
to call this function are met if (iData.WebServiceAuthorizationCode !=
```



```

WebServicePassword) return new ExternalLoginProviderResult(false,
"Permission Denied"); if (string.IsNullOrEmpty(iData.LoginUsername) ||
string.IsNullOrEmpty(iData.LoginPassword)) return new
ExternalLoginProviderResult(false, "Required Input Missing"); // This is a
sample of how to do a basic username/password check (use your own database
or list here) if (iData.LoginUsername.ToLowerInvariant() == "myusername" &&
iData.LoginPassword.ToLowerInvariant() == "mypassword") { result = new
ExternalLoginProviderResult(); result.Success = true; result.Message =
"Login Successful"; result.OutputVariables.Add("Authentication=OK");
result.OutputVariables.Add("EmailAddress=putUsersEmailAddressHere@example.com");
// optional result.OutputVariables.Add("DisplayName=putUsersFullNameHere");
// optional return result; } // Below is a sample Active Directory
Authentication implementation //string[] unDomainUsernameSplit =
loginUsername.Split(new char[] { '/', '\\' }, 2); //if
(unDomainUsernameSplit.Length == 2) //{ // if
(LDAP.AuthenticateLogin(unDomainUsernameSplit[0], unDomainUsernameSplit[1],
// loginPassword, LDAP.NetworkType.ActiveDirectory) ==
LDAP.LDAPResult.Authenticated) // { // return new
ExternalLoginProviderResult(true, "Login Successful", "Authentication=OK");
// } //} // Return a failure if there's no match return new
ExternalLoginProviderResult(true, "Login Failure", "Authentication=FAIL");
}

```

GetSignInCookieInfo Method

The GetSignInCookieInfo method validates the username and password for single sign-on from another website. This method is also called when an authentication cookie cannot be found for the currently logged in user. Your web.config file must be set up to use cookies from another site if you choose to use single sign-on. For more information, refer to the SmarterTools Knowledge Base

- Parameters
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The username you are authenticating with
- Return Type :ExternalLoginProviderResult
- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- OutputVariables : A generic list of strings containing several output parameters needed by

SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

- **Authentication** :Determines whether or not the authentication check succeeded. Possible values are OK or FAIL
- **EmailAddress** :The email address of the user
- **DisplayName** :The display name of the user
- **cf_*** :The value of current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. These custom field values will be assigned to the user who is logging in. If the provided custom fields do not exist, the value is ignored.

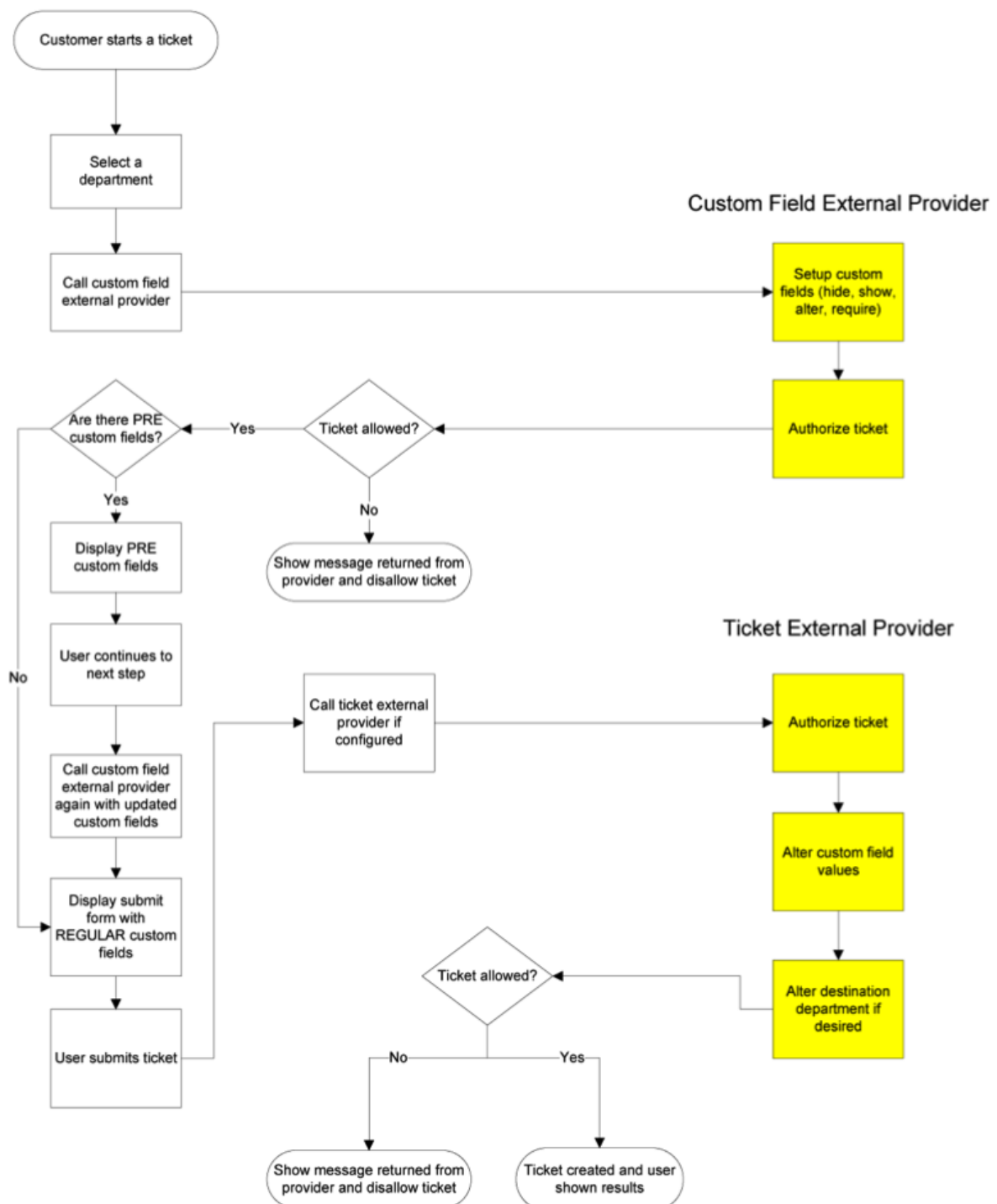
Here is an example of how the GetSignInCookieInfo method is used:

```
// Same as Authenticate function, but does not verify password because
// cookie is authenticated. Therefore, your // logic will be identical to the
// Authenticate function, but does not require you to check the password. //
// Inputs // authPW = Validates that calling software is valid //
loginUsername // Outputs // Authentication = OK or FAIL // EmailAddress =
Email address of user // DisplayName = Display Name of User [WebMethod]
public ExternalLoginProviderResult
GetSignInCookieInfo(ExternalLoginProviderInputs inputs) {
    ParsedLoginInputData iData = new ParsedLoginInputData(inputs); // Verify
    that all necessary criteria to call this function are met if
    (iData.WebServiceAuthorizationCode != WebServicePassword) return new
    ExternalLoginProviderResult(false, "Permission Denied"); if
    (string.IsNullOrEmpty(iData.LoginUsername)) return new
    ExternalLoginProviderResult(false, "Required Input Missing"); // This is a
    sample of how to do a basic username/password check (use your own database
    or list here) if (iData.LoginUsername.ToLowerInvariant() == "myusername") {
    ExternalLoginProviderResult result = new ExternalLoginProviderResult();
    result.Success = true; result.Message = "Login Successful";
    result.OutputVariables.Add("Authentication=OK");
    result.OutputVariables.Add("EmailAddress=putUsersEmailAddressHere@example.com");
    // optional result.OutputVariables.Add("DisplayName=putUsersFullNameHere");
    // optional return result; } // Below is a sample Active Directory
    Authentication implementation //string[] unDomainUsernameSplit =
    loginUsername.Split(new char[] { '/', '\\' }, 2); //if
    (unDomainUsernameSplit.Length == 2) //{ // if
    (LDAP.AuthenticateLogin(unDomainUsernameSplit[0], unDomainUsernameSplit[1],
    // "", LDAP.NetworkType.ActiveDirectory) == LDAP.LDAPResult.Authenticated)
    // { // return new ExternalLoginProviderResult(true, "Login Successful",
```

```
"Authentication=OK"); // } //} return new ExternalLoginProviderResult(true,
"Login Failure", "Authentication=FAIL"); }
```

CustomFieldProvider

The custom field provider allows you to customize the custom fields that display when a user submits a ticket or live chat and the values associated to each custom field. The custom field provider utilizes the `IExternalCustomFieldProvider` interface. For a better understanding of how the custom field provider works with SmarterTrack, please refer to the flow chart below:



GetCustomFieldOptions Method

The GetCustomFieldOptions method allows you to specify which custom fields a user may complete into two distinct steps. This is useful because it enables companies to allow their customers to complete certain fields during the first step of the live chat or ticket submission process and use the information customers provide to determine which custom fields are displayed during the second step.

People often confuse this method with the StartTicket or StartChat methods of other external providers, but these methods perform slightly different functions. See the Ticket Tracking Provider and Live Chat Tracking Provider sections of this document for more information.

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The customer's username
- DepartmentName :The department name that the Ticket or Live Chat is being started through
- Location :This is the step that the user is currently on in the Ticket or Live Chat submission process. Possible values for this are PRE or REGULAR
- cf_* :Value of current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. These values would obviously be empty if you were on step 1 of the submission process (location=PRE)
- Return Type :ExternalCustomFieldProviderResult
- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- CustomFieldDataItems :A generic list of properties that will tell SmarterTrack which action(s) to take with each individual custom field
- CustomFieldName :This is the identifier for the custom field being changed. This value must be identical to the name of the custom field in SmarterTrack
- DisplayWithInformationLookup :A Boolean value that indicates whether or not this field should be displayed on the first step of the ticket or live chat submission process. If this value is set to false, this custom field will be displayed with the other custom fields on the regular submission page (location=NORMAL)
- ChangeListOptions :A Boolean value that indicates whether or not a drop down type custom field should have its list options changed. This works alongside the ListOptions property below
- ListOptions :A generic list of strings that is used to overwrite the contents of a drop down

menu type custom field. These values will only be used if `ChangeListOptions` is set to true

- `ChangeRequired` :A Boolean value that indicates whether or not the custom field should have its required status changed. This works alongside the `NewRequiredValue` property
- `NewRequiredValue` :A Boolean value that is used to determine if this custom field should be marked as required. This value is only used if `ChangeRequired` is set to true
- `ChangeVisible` :A Boolean value that indicates whether or not the custom field should have its visibility changed. The works alongside the `NewVisibleValue` property
- `NewVisibleValue` :A Boolean value that is used to determine if this custom field should be visible to the user. This value is only used if `ChangeVisible` is set to true
- `OutputVariables` :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)
- `CanStartTickets` :Determines whether or a not a ticket can be started. Possible values for this are true and false. If this value if false,
- `CanStartChats` : Determines whether or a not a live chat can be started. Possible values for this are true and false. If this value if false, SmarterTrack will display an error message to the user

Here is an example of how the `GetCustomFieldOptions` method is used:

```
// Inputs // authPW = Validates that calling software is valid //
loginUsername // departmentName // location = PRE or REGULAR (pre called
after department selection made. Regular called after search page and
before compose page) // cf_* = value of current custom fields, such as
"cf_ticket type=phone ticket" // Outputs // CanStartTickets = true or false
// CanStartChats = true or false // Custom field overrides [WebMethod]
public ExternalCustomFieldProviderResult
GetCustomFieldOptions(ExternalCustomFieldProviderInputs inputs) {
    ParsedCustomFieldInputData iData = new ParsedCustomFieldInputData(inputs);
    // Verify that all necessary criteria to call this function are met if
    (iData.WebServiceAuthorizationCode != WebServicePassword) return new
    ExternalCustomFieldProviderResult(false, "Permission Denied"); bool
    canStartTickets = true; bool canStartChats = true;
    ExternalCustomFieldProviderResult result = new
    ExternalCustomFieldProviderResult(true, "Result okay");
    ExternalCustomFieldData cfdata; #region Example: Allow tickets/chats to
    only certain customers /* * You could check a database and see if the user
    has the ability to contact certain departments, for example. * In this
    example, only the user "myusername" is allowed to start tickets and chats
    for all departments. * Everyone else can only start chats (not tickets),
    and can only contact the sales department */ //if (iData.LoginUsername ==
```

```

"myusername") //{ // canStartTickets = true; // canStartChats = true; //{
//else //{ // result.Message = "You are not currently permitted to contact
that department."; // shown in ticket pages // canStartTickets = false; //
if (iData.DepartmentName.ToUpperInvariant() == "SALES DEPARTMENT") //
canStartChats = true; // else // canStartChats = false; //{ #endregion
#region Example: Set a custom list of domains for them to choose from /* *
This example shows how to fill custom field drop-down lists for the user
based on their login. In this case, * we fill a dropdown list with their
accounts listed in our database, so that they can choose which one * the
support is for. * * It is important that the custom field already exist in
SmarterTrack * */ //if (iData.DisplayLocation == DisplayLocations.Pagel_Pre
&& iData.DepartmentName.ToUpperInvariant() == "SUPPORT DEPARTMENT") //{ //
// Here you would look up the options. For now, we'll assume we brought
back abc.com and def.com from our database

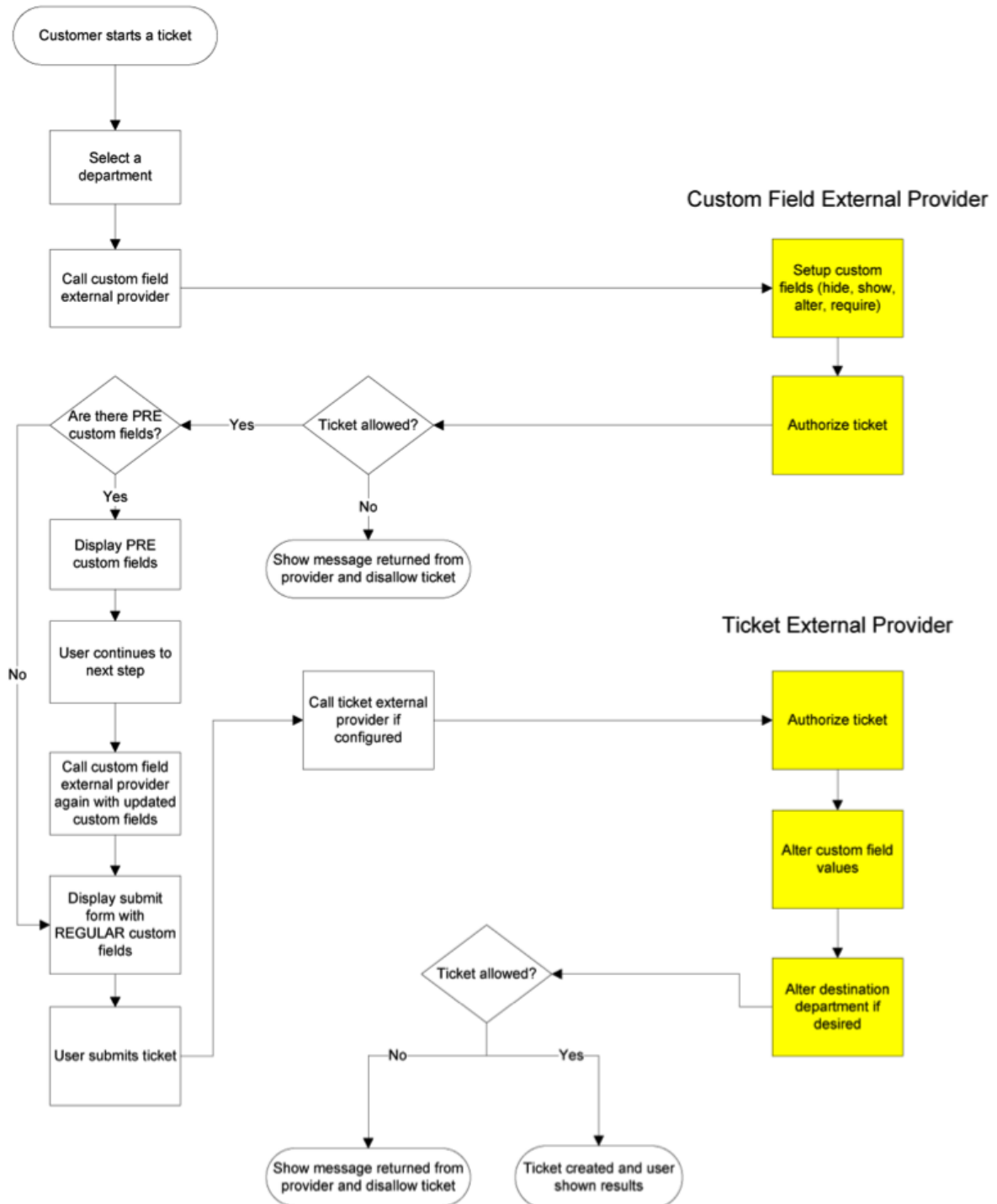
// cfdata = new ExternalCustomFieldData(); // cfdata.CustomFieldName =
"Account"; // cfdata.ChangeRequired = true; // cfdata.NewRequiredValue =
true; // cfdata.ChangeListOptions = true; //
cfdata.DisplayWithInformationLookup = false; // Set this to true if you
need to show/hide other custom fields based on the value they select. //
cfdata.ListOptions.Add("abc.com"); // cfdata.ListOptions.Add("def.com"); //
result.CustomFieldDataItems.Add(cfdata); //{ #endregion #region Example:
Custom Issue Types by Department /* * This example shows how to fill custom
field drop-down lists for the user based on the department chosen. In this
case, * we fill a dropdown list with possible types of issues * * It is
important that the custom field already exist in SmarterTrack * */ //cfdata
= new ExternalCustomFieldData(); //cfdata.CustomFieldName = "Type of
Issue"; //cfdata.ChangeListOptions = true;
//cfdata.DisplayWithInformationLookup = false; //cfdata.ChangeRequired =
true; //cfdata.NewRequiredValue = true; //cfdata.ChangeVisible = true;
//cfdata.NewVisibleValue = true; //if
(iData.DepartmentName.ToUpperInvariant().IndexOf("SALES") != -1) //{ //
cfdata.ListOptions.Add("Change Plan"); // cfdata.ListOptions.Add("Help with
order"); // cfdata.ListOptions.Add("Questions about plans"); //
cfdata.ListOptions.Add("Questions about features"); //
cfdata.ListOptions.Add("Help finding a product"); //{ //else if
(iData.DepartmentName.ToUpperInvariant().IndexOf("SUPPORT") != -1) //{ //
cfdata.ListOptions.Add("Web site issues"); //
cfdata.ListOptions.Add("Database issues"); // cfdata.ListOptions.Add("Email
issues"); // cfdata.ListOptions.Add("Dedicated server issues"); //
cfdata.ListOptions.Add("Statistics issues"); //
cfdata.ListOptions.Add("Network connectivity"); //{ //else //{ // //

```

```
Removing issue types field, since there's no options //  
cfdata.ChangeRequired = true; // cfdata.NewRequiredValue = false; //  
cfdata.ChangeVisible = true; // cfdata.NewVisibleValue = false; //  
//result.CustomFieldDataItems.Add(cfdata); #endregion result.Success =  
true; result.OutputVariables.Add("CanStartTickets=" + canStartTickets);  
result.OutputVariables.Add("CanStartChats=" + canStartChats); return  
result; }
```

Ticket Tracking Provider

The ticket tracking provider is used to determine if a ticket can be started based on the custom field values that have been entered and based on the needs for your company. The ticket tracking provider utilizes the `IEternalTicketProvider` interface. For a better understanding of how the ticket tracking provider works with SmarterTrack, please refer to the flow chart below:



In the example below, the custom field provider is used to determine the options available on each step in the ticket submission process and the ticket tracking provider uses the options selected to determine whether the ticket can be started.

StartTicket Method

The StartTicket method is used to tell SmarterTrack if the ticket can be created. This method is called just before a ticket is submitted (regardless of how the ticket was created). This method may also change the custom fields for the ticket and can be used to override the customer's department selection.

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The customer's username. This is used for tickets submitted through the Web interface
- EmailFrom :The customer's email address. This is used for tickets submitted through email.
- DepartmentName :The department's name that the customer is creating a Ticket for.
- TicketNumber :The ticket number for the ticket about to be created.
- cf_* :Value of this Ticket's current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. At this point in the ticket submission process these values should be completed.
- Return Type :
- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- OutputVariables :A generic list of strings containing several output parameters needed by

SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

- **TicketCreation** :Determines whether or not this ticket can be created. Possible values for this are true and false. If this value is false, SmarterTrack will display an error message to the user and will NOT create the Ticket
- **departmentName** :If this value is set, the ticket will be created for this department instead of what the user submitted originally
- **groupName** :If this value is set, the ticket will be created for this group and the department this group is associated with instead of what the user submitted originally.
- **departmentID** :If this value is set, the ticket will be created for this department instead of what the user submitted originally
- **groupID** : If this value is set, the ticket will be created for this group and the department this group is associated with instead of what the user submitted originally.
- **cf_*** : Value of this ticket's current custom fields. If these values are set, they will replace any existing values for the custom field

Here is an example of how the StartTicket method is used:

```
// This function is called right after the person clicks on the Submit
Ticket button. This gives your provider one last // chance to abort the
process or store any custom fields. // // Inputs // authPW = Validates that
calling software is valid // loginUsername (for tickets submitted through
Web interface) // emailFrom (for tickets submitted through email) //
departmentName // subject // ticketNumber = the ticket number about to be
created // cf_* = values of custom fields // Outputs // TicketCreation =
TRUE or FALSE // cf_* = output values of custom fields [WebMethod] public
ExternalTicketProviderResult StartTicket(ExternalTicketProviderInputs
inputs) { ParsedTicketInputData iData = new ParsedTicketInputData(inputs);
ExternalTicketProviderResult result = new ExternalTicketProviderResult();
// Verify that all necessary criteria to call this function are met if
(iData.WebServiceAuthorizationCode != WebServicePassword) return new
ExternalTicketProviderResult(false, "Permission Denied"); // This would be
the place to check custom fields and the person's account to see if they
can // submit tickets. If they can, and you use a pay-per-ticket model,
deduct the ticket from // the person's account here. // For example, to
return an error that the person is out of support tickets, use the
following code // return new ExternalTicketProviderResult(true, "There are
no more tickets in your account.", "TicketCreation=FALSE"); #region
Example: Set the customer's custom fields /* * In this example, we set some
hidden custom fields based on the logged in user's information. These *
```

```

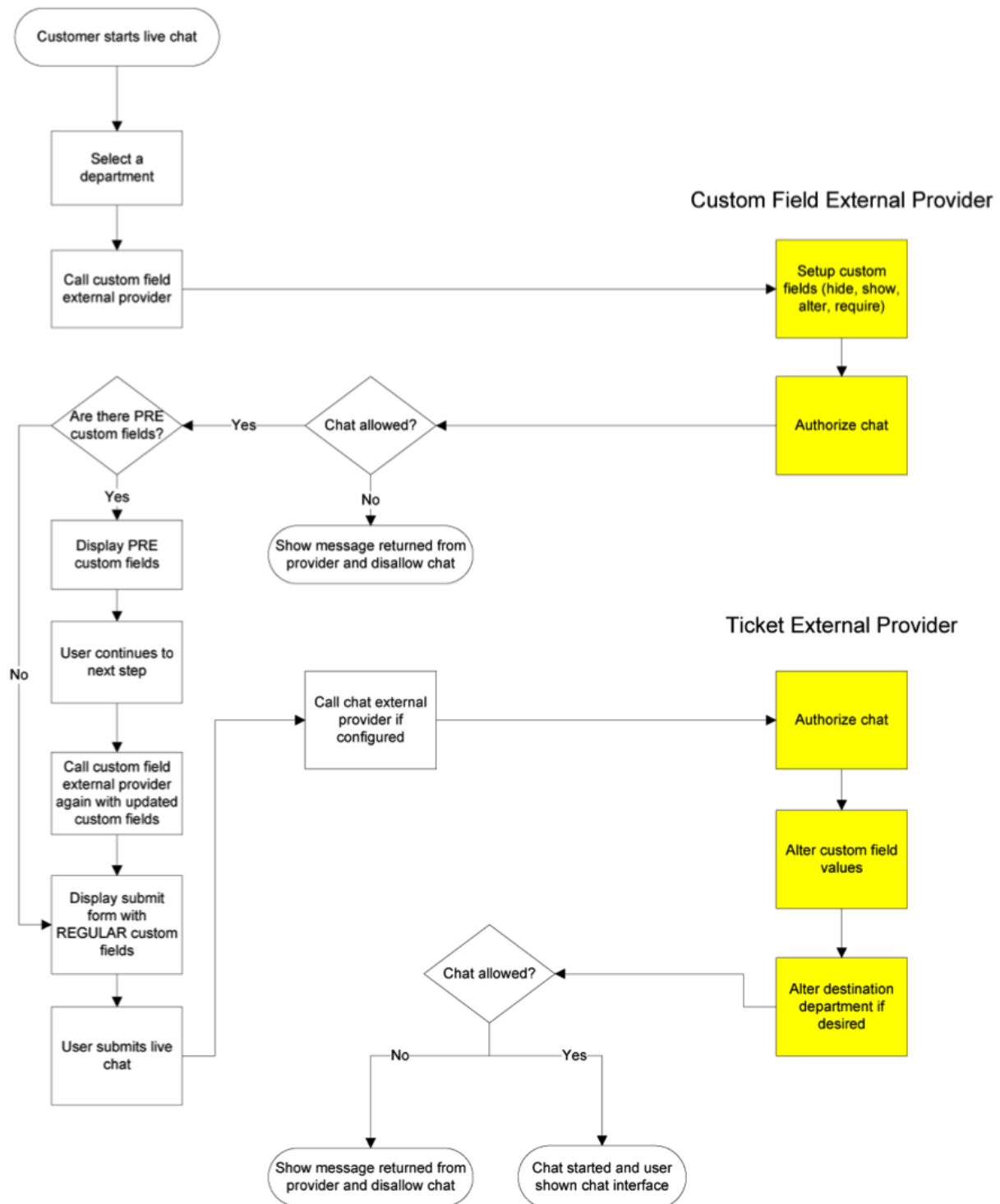
custom fields MUST exist already in SmarterTrack (without the cf_ prefix) *
*/ //if (iData.LoginUsername.ToLowerInvariant() == "myusername") //{ //
result.OutputVariables.Add("cf_Billing ID=4126"); //
result.OutputVariables.Add("cf_Plan Type=ASP.NET Semi-dedicated"); //}
#endregion #region Example: Reroute tickets /* * In this example, we
reroute any tickets with the subject containing Urgent to the Critical
Support department. * We also reroute any tickets with a custom field value
of "Server Down" to the Server Operations Department * (assuming we had
that custom field set up in our system). * You could also modify this to
reroute customers with certain attributes in your database (priority
customers). * */ //if (iData.Subject.ToUpperInvariant().Contains("URGENT"))
//{ // result.OutputVariables.Add("departmentName=Critical Support"); //}
//string value; //if (iData.CustomFields.TryGetValue("Issue Type", out
value) && value.ToUpperInvariant() == "SERVER DOWN") //{ //
result.OutputVariables.Add("departmentName=Server Operations Department");
//} #endregion

result.Success = true; result.Message = "Ticket Creation Successful";
result.OutputVariables.Add("TicketCreation=TRUE"); return result; }

```

Live Chat Tracking Provider

The live chat tracking provider is used to determine if a live chat can be started based on the custom field values that have been entered and based on the needs for your company. The live chat tracking provider utilizes the `IExternalChatProvider` interface. For a better understanding of how the live chat tracking provider works with SmarterTrack, please refer to the flow chart below:



StartChat Method

The StartChat method is used to tell SmarterTrack if the live chat can be started. This method is called just before a live chat is submitted to the queue. This method may also change the custom fields for the live chat and can be used to override the customer's department selection.

- Parameters :

- **Inputs** :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- **AuthPW** :Used for validating if the calling software is valid
- **LoginUsername** :The customer's username. This is used for live chats submitted through the Web interface
- **DepartmentName** : The department's name that the customer is starting a live chat for
- **cf_*** :The value of the live chat's custom fields. An example of a custom field would be cf_chat type=support or cf_display name=Test. At this point in the live chat submission process these values should be completed.
- **Return Type** : ExternalCustomFieldProviderResult
- **Message** :A message indicating the result of the Web service call
- **Success** :A Boolean value indicating the result of the Web service call
- **OutputVariables** :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)
- **ChatCreation** : Determines whether or not this live chat can be created. Possible values for this are true and false. If this value is false, SmarterTrack will display an error message to the user and will NOT start the live chat
- **departmentName** :If this value is set, the live chat will be created for this department instead of what the user submitted originally
- **cf_*** :Value of this live chat's current custom fields. If these values are set, they will replace any existing values for the custom field

Here is an example of how the StartChat method is used:

```
// This function models the StartTicket function almost exactly. It is
provided so you can make the processes run differently // for each. // //
Inputs // authPW = Validates that calling software is valid //
loginUsername (for chats submitted through Web interface) // emailFrom (for
chats submitted through email) // departmentName // cf_* = values of custom
fields // Outputs // ChatCreation = TRUE or FALSE // cf_* = output values
of custom fields [WebMethod] public ExternalChatProviderResult
StartChat(ExternalChatProviderInputs inputs) { ParsedChatInputData iData =
new ParsedChatInputData(inputs); ExternalChatProviderResult result = new
ExternalChatProviderResult(); // Verify that all necessary criteria to call
this function are met if (iData.WebServiceAuthorizationCode !=
WebServicePassword) return new ExternalChatProviderResult(false,
```

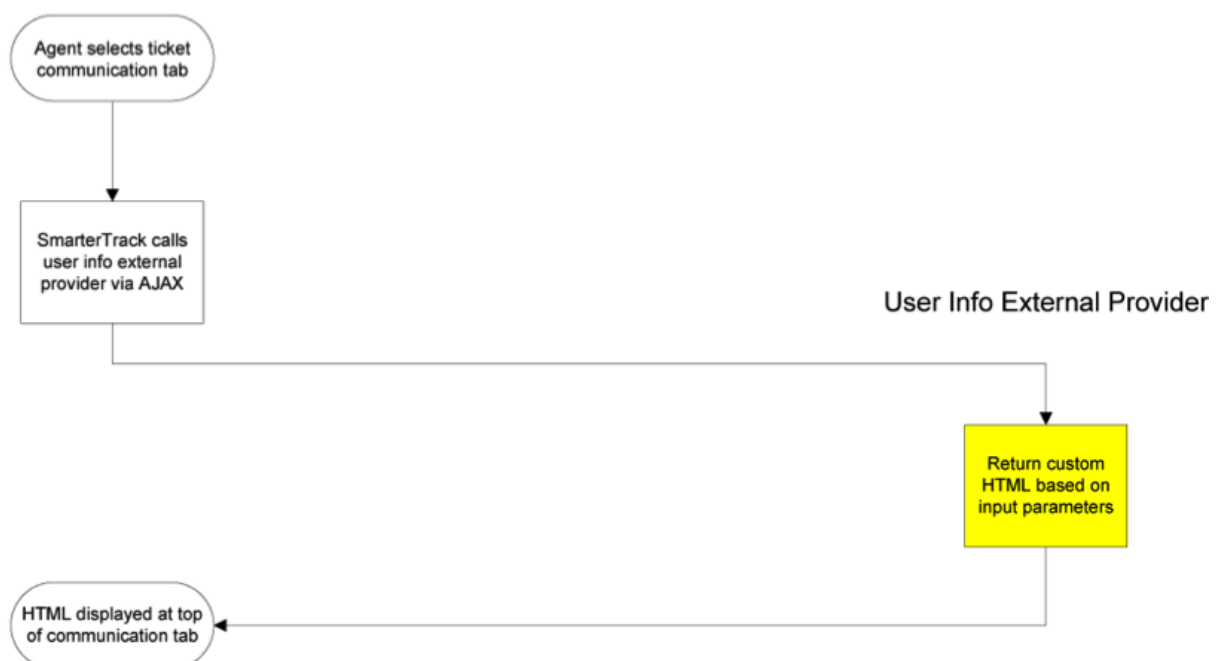
```

"Permission Denied"); // This would be the place to check custom fields and
the person's account to see if they can // submit chats. If they can, and
you use a pay-per-chat model, deduct the chat from // the person's account
here. // For example, to return an error that the person is out of support
chats, use the following code // return new
ExternalChatProviderResult(true, "There are no more chats in your
account.", "ChatCreation=FALSE"); // You can also set output custom fields,
which will be filled in with the chat. #region Example: Set the customer's
custom fields /* * In this example, we set some hidden custom fields based
on the logged in user's information. These * custom fields MUST exist
already in SmarterTrack (without the cf_ prefix) * */ //if
(iData.LoginUsername.ToLowerInvariant() == "myusername") //{ //
result.OutputVariables.Add("cf_Billing ID=4126"); //
result.OutputVariables.Add("cf_Plan Type=ASP.NET Semi-dedicated"); //}
#endregion result.Success = true; result.Message = "Chat Creation
Successful"; result.OutputVariables.Add("ChatCreation=TRUE"); return
result; }

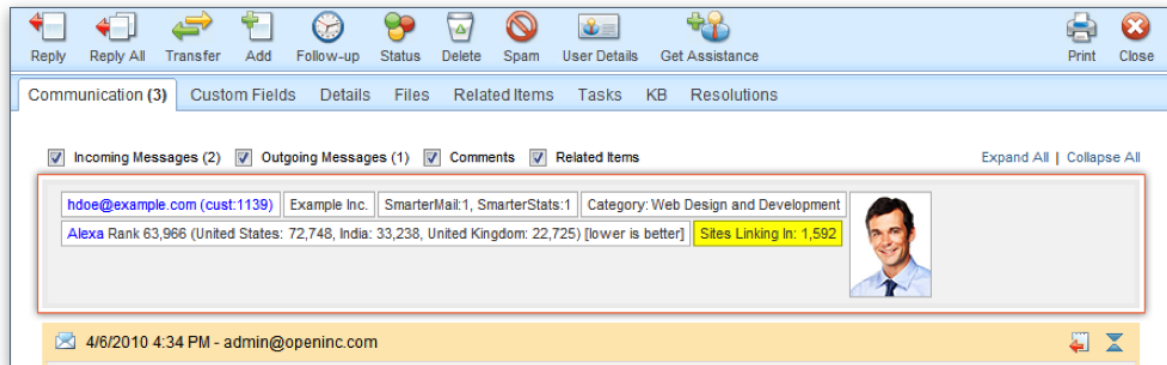
```

User Information Provider

The user information provider is used to retrieve custom user data and display it in the communication tab of a ticket. This provider is useful for businesses that use a different database to track customer account information or for businesses that want to display all available information on a particular user. The user information provider utilizes the `IExternalUserInfoProvider` interface. For a better understanding of how the user information provider works with SmarterTrack, please refer to the flow chart below:



In the example below, the user information provider is querying an external database to retrieve custom user information such as the user's email address, company, number of licenses, and Alexa ranking.



GetUserDetails Method

The GetUserDetails method is used to tell SmarterTrack which additional information should be displayed when a ticket is viewed. This method is called on every ticket view in the management interface. This method works by returning HTML that is displayed at the top of the communication tab in each ticket

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- Username :The customer's username. This is used for ticket's submitted through the Web interface
- Email :The customer's email address.
- BrandName :The brand's name that this ticket is currently assigned to
- DepartmentName :The department's name that this ticket is currently assigned to
- Group :The group's name that this ticket is currently assigned to
- TicketNumber :The identifier for the ticket being viewed
- InteractionType :For the time being this value is always set to "ticket". This provider may be used for other purposes in later versions.
- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

- **UserInfoHTML** :The HTML that is injected at the top of the communication tab for each ticket. If you do not set this value or if you leave it blank the user information area will not display.
- **OutputVariables** :An array of other information pertaining to the user. This functionality isn't currently supported.

Here is an example of how the `GetUserDetails` method is used:

```
// This function is called when a Ticket is viewed in the management
// interface. // If values are returned for OtherUserInfo a user //
// information area will appear just above the conversation. In the future,
// this function may // also be used to retrieve information // for Live Chats
// and in the users settings page. // // Inputs // authPW = Validates that
// calling software is valid // username = The username for the account you
// are retrieving information for // email = The email address for the user
// you are retrieving information for // brandName = The brand that the Ticket
// was created in // departmentName = The department that the Ticket was
// created in // groupName = The group that the Ticket was created in //
// ticketNumber = the identifier for the Ticket you are retrieving information
// for // interactionType = Where this call is being made from // Outputs //
// UserInfoHtml = The HTML that will be displayed just above the conversation
// of a ticket // OutputVariables = An array of other information pertaining
// to the user. // This functionality isn't currently supported. [WebMethod]
public ExternalUserInfoProviderResult
GetUserDetails(ExternalUserInfoProviderInputs inputs) {
    ParsedUserInfoInputData iData = new ParsedUserInfoInputData(inputs);
    ExternalUserInfoProviderResult result = new
    ExternalUserInfoProviderResult(); // Verify that all necessary criteria to
    call this function are met if (iData.WebServiceAuthorizationCode !=
    WebServicePassword) return new ExternalUserInfoProviderResult(false,
    "Permission Denied"); // This would be the place to check account
    information and add custom user information and HTML #region Example: Add a
    user's account number /* * if (iData.Username.ToLowerInvariant() ==
    "myusername") * { * result.UserInfoHtml = "Account Number: 000-0000000-0000
    Partner: Yes"; * } */ #endregion result.Success = true; result.Message =
    "User Account Information Retrieved Successfully"; //
    result.OutputVariables is unused at this time return result; }
```

Events Provider

The events provider is used to perform custom actions when an event action occurs. SmarterTrack's event system can be configured to fire this provider with details of the event and its conditions. This

provider is useful for businesses that wish to notify another system or database of any action taken in SmarterTrack. The event provider utilizes the IExternalEventProvider interface. For a better understanding of how the event provider works with SmarterTrack, please refer to the flow chart below:

NotifyEventFired Method

The NotifyEventFired method is used to notify another system or database when an event is fired in SmarterTrack. This method is called on any event where the “Notify External Provider” event action is configured. This event action is only available for system level events.

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)
- AuthPW :Used for validating if the calling software is valid
- EventType :The numeric ID for this event. See section labeled “SmarterTrack Event Type Identifications” for a complete list of numeric IDs.
- Args_[Key] : The argument / condition value that was defined in the event
- Message : A message indicating the result of the Web service call
- Success : A Boolean value indicating the result of the Web service call

Here is an example of how the NotifyEventFired method is used:

```
// This is an example NotifyEventFired function that would be executed when
SmarterTrack fires // the Notify External Provider event action. // //
Inputs // authPW = Validates that calling software is valid // eventType =
Numeric identification for the event that was fired. // args_[key] = The
value of an argument passed in by the event system where [key] is the // //
name of the argument or condition [WebMethod] public
ExternalEventProviderResult NotifyEventFired(ExternalEventProviderInputs
inputs) { ParsedEventInputData iData = new ParsedEventInputData(inputs);
ExternalEventProviderResult result = new ExternalEventProviderResult(); //
Perform custom notification action here... //if (iData.EventType == 501000)
//iData.Arguments["title"] ... // Verify that all necessary criteria to
call this function are met if (iData.WebServiceAuthorizationCode !=
WebServicePassword) return new ExternalEventProviderResult(false,
"Permission Denied"); result.Success = true; result.Message = "Event
Notification Successful"; return result; }
```

SmarterTrack Event Type Identifications

Every event type in SmarterTrack has a numerical identification associated to it that is used when configure the events external provider. When the NotifyEventFired is called, SmarterTrack uses the event identification to specify the action that triggers the event notification.

Event Type	ID
KB Article Created	501000
KB Article Modified	501001
KB Article Flagged For Review	501002
KB Article Stale	501003
KB Article Marked As Reviewed	501004
KB Article Deleted	501005
Ticket Created	502000
Ticket Transferred	502001
Ticket Status Changed	502002
Ticket Priority Changed	502003
Ticket Deleted	502004
Ticket Comment Added	502005
Ticket Message Sent	502006
Ticket Idle	502008
Ticket Count Department	502009
Ticket Count Group	502010
Ticket Count Agent	502011
Ticket Follow Up Scheduled	502012
Ticket Followed Up	502013
Ticket Time Log Created	502014
WhosOn Chat Forced	503000
WhosOn Chat Accepted	503001
WhosOn Chat Invited	503002
WhosOn Chat Invite Rejected	503003
WhosOn Chat Invite Ignored	503004
WhosOn Visitor Removed	503005
WhosOn Visitor Purged	503006
WhosOn Online Activity	503007
Chat Channel Joined	505000
Chat Channel Left	505001
Chat Channel Invited	505002
Survey Answered	506000
Survey Offered	506001
Task Created	507000
Task Modified	507001
Task Deleted	507002
Task Started	507003
Task Due	507004
Task Comment Added	507005
Call Log Created	508000

Call Log Modified	508001
Call Log Deleted	508002
Call Log Attached To Ticket	508003
Call Log Detached From Ticket	508004
Call Log Time Log Created	508005
POP Connection Failed	509000
POP Login Failed	509001
POP Download Failed	509002
POP Import Failed	509003
SMTP Connection Failed	510000
SMTP Login Failed	510001
SMTP Delivery Failed	510002
Live Chat Started	511000
Live Chat Ended	511001
Live Chat Transferred	511002
Live Chat Deleted	511003
Live Chat Attached To Ticket	511004
Live Chat Detached From Ticket	511005
Live Chat Incoming Message	511006
Live Chat Outgoing Message	511007
Live Chat Idle	511008
Live Chat Department Count	511009
Live Chat Group Count	511010
Live Chat Agent Count	511011
Live Chat Comment Added	511012
Live Chat Time Log Created	511013
Agent Ticket Status Changed	512000
Agent Live Chat Status Changed	512001

Connecting SmarterTrack to an External Provider

Although there are several different external providers available for SmarterTrack, they are all configured using the same basic process. Follow these steps to connect SmarterTrack to your third-party Web service:

- Log in to the SmarterTrack management as a system administrator.
- Click the settings icon .
- Expand the System Settings folder.
- Click External Providers in the navigation pane. The external provider settings will load in the content pane.
- Click the Options tab and select the appropriate checkbox to enable the desired external provider.
- Select the appropriate external provider tab: Login, Custom Fields, Ticket, Live Chat, User Information or Events
- In the Web Service URL field, type the URL to the Web service.

- In the Web Service Password field, type the password used to authenticate the Web service.
- Click Save .

Any other settings are optional.

Automation with Web Services

SmarterTrack was built with custom configuration and integration in mind. In addition to being able to customize the look and feel of SmarterTrack, developers and/or system administrators have the ability to code to the SmarterTrack application using Web services. These Web services allow developers and/or system administrators to automate a variety of different actions, giving them the ability to add tickets to SmarterTrack on-the-fly, add notes, and more.

The Automation with Web Services documentation may include services that have not been released to the public yet or are not available in the version you are using.

Note: Web services are intended for use by high-volume and automated businesses environments and hosting companies as they develop procedures to manage their SmarterTrack system and work flow. In addition, this document assumes a basic understanding of Web service technologies and ASP.NET programming.

Integrations

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:

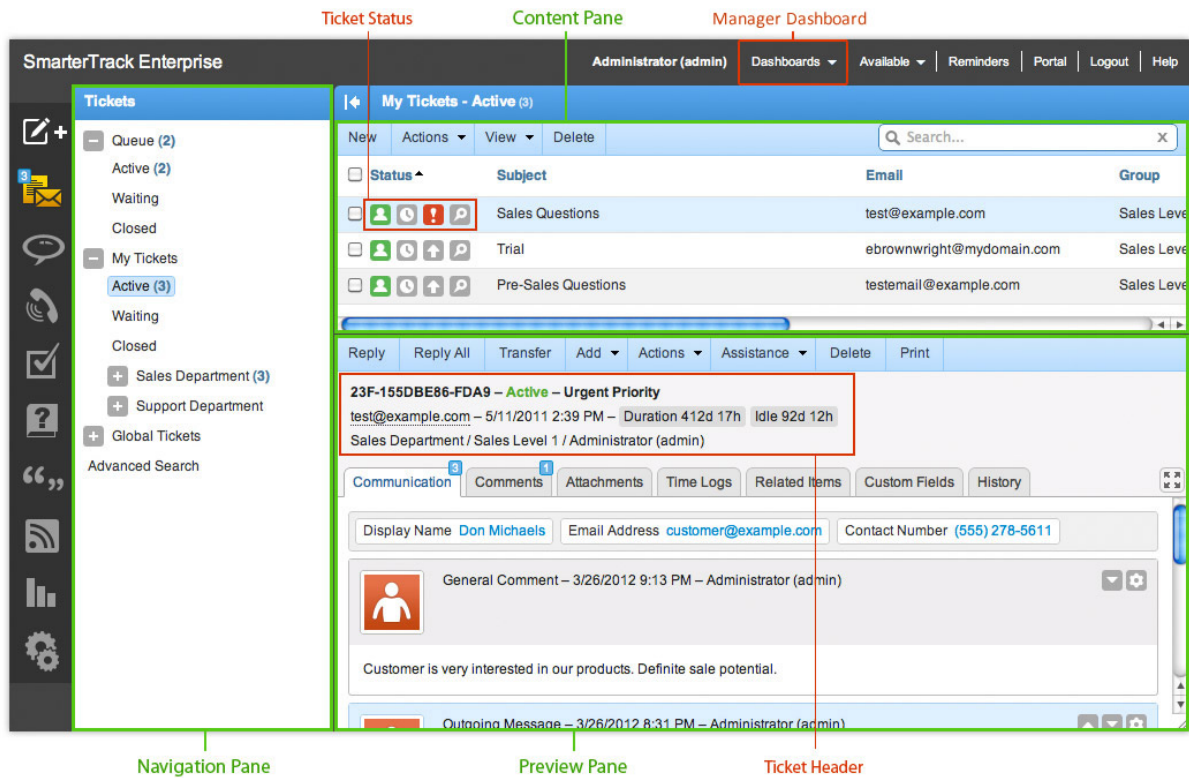
- Email (single line text) - The email address of the WHMCS user
- Display Name (Single Line Text) - The first and last name of the WHMCS user
- Domains (Single Line Text) - In WHMCS, a drop down list that is populated with a user's domains. The selected domain will be sent to SmarterTrack as a single 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 field display names in SmarterTrack must match these names character for character or else they will not populate correctly.

Interface Diagrams

Tickets

To better understand the different areas of tickets, please refer to the diagram below:



Live Chat

To better understand the different areas of live chat, please refer to the diagram below:

The screenshot shows the SmarterTrack Enterprise Live Chat interface. Annotations include:

- Brand Selector:** Points to the dropdown menu showing "- All Brands -".
- Live Chat Status:** Points to the "Sales Department - Inactive (12)" header.
- Content Pane:** Points to the chat conversation area showing messages from Jane Doe and the Administrator.
- Navigation Pane:** Points to the left sidebar containing "Live Chat", "Queue", "My Live Chats", "Global Live Chats", "Active", "Inactive", "Sales Department", "Sales Level 1", "Support Department", "By Agent", "Instant Messenger", "Chat Rooms", and "Advanced Search".
- Preview Pane:** Points to the chat conversation area showing messages from Jane Doe and the Administrator.
- Live Chat Header:** Points to the header area of the chat conversation showing "17B-1710D61F-0301 - Inactive - Unknown Location".

Call Logs

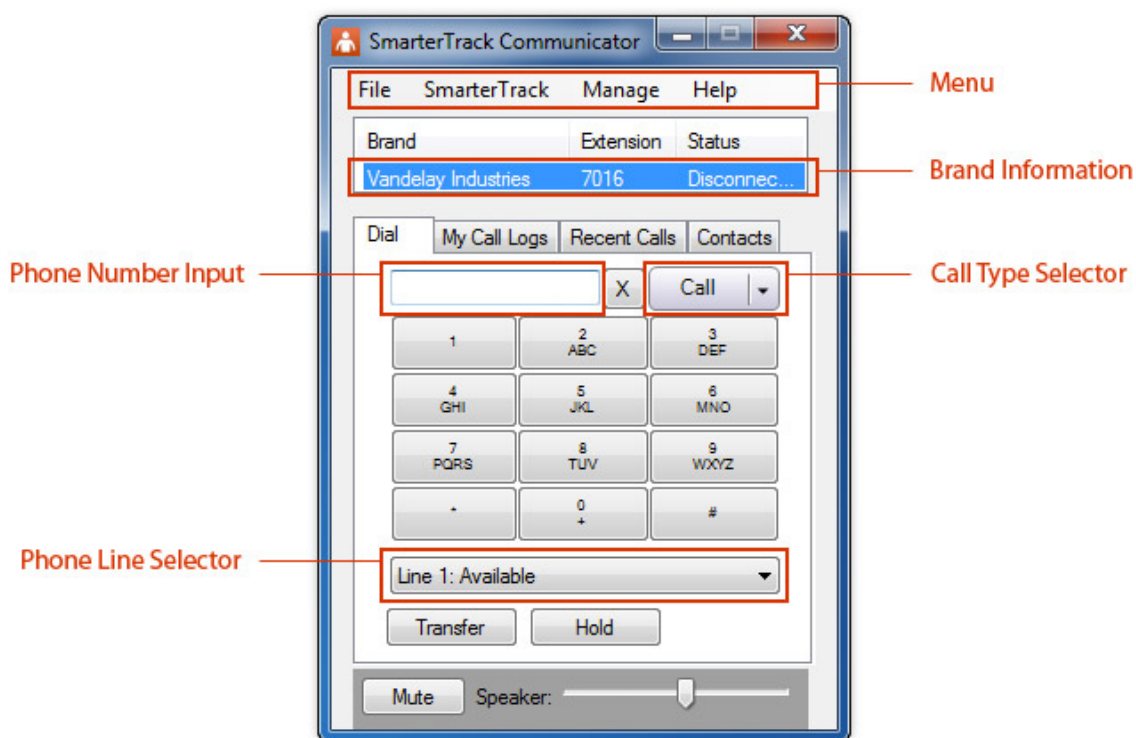
To better understand the different areas of call logs, please refer to the diagram below:

The screenshot shows the SmarterTrack Enterprise Call Logs interface. Annotations include:

- Content Pane:** Points to the call log entry area showing details for "225-15C1D3F9-9436 - Outgoing - 623-565-6896".
- Manager Dashboard:** Points to the "Dashboards" dropdown menu in the top navigation bar.
- Navigation Pane:** Points to the left sidebar containing "Call Logs", "My Call Logs", "Global Call Logs", "All Items", "Sales Department", "All Items", "Sales Level 1", "Support Department", and "Advanced Search".
- Preview Pane:** Points to the call log entry area showing details for "225-15C1D3F9-9436 - Outgoing - 623-565-6896".
- Call Log Header:** Points to the header area of the call log entry showing "225-15C1D3F9-9436 - Outgoing - 623-565-6896".

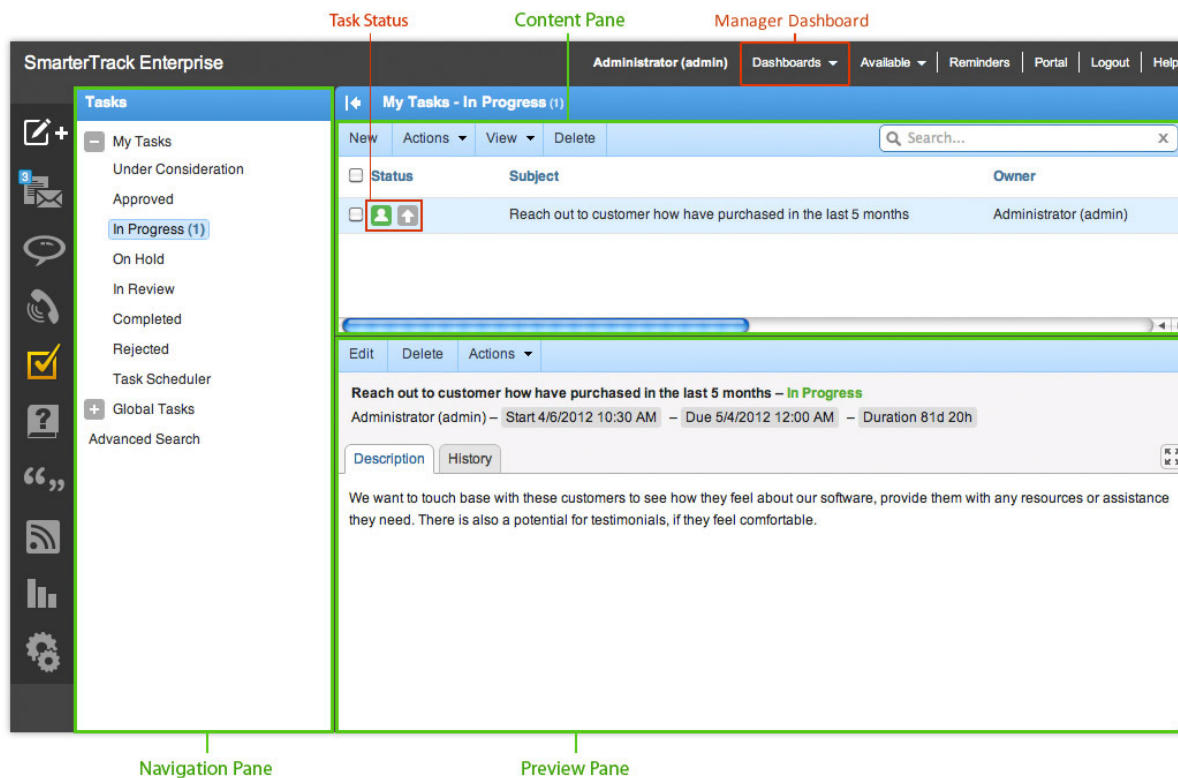
SmarterTrack Communicator

To better understand the different areas of the SmarterTrack Communicator, please refer to the diagram below:



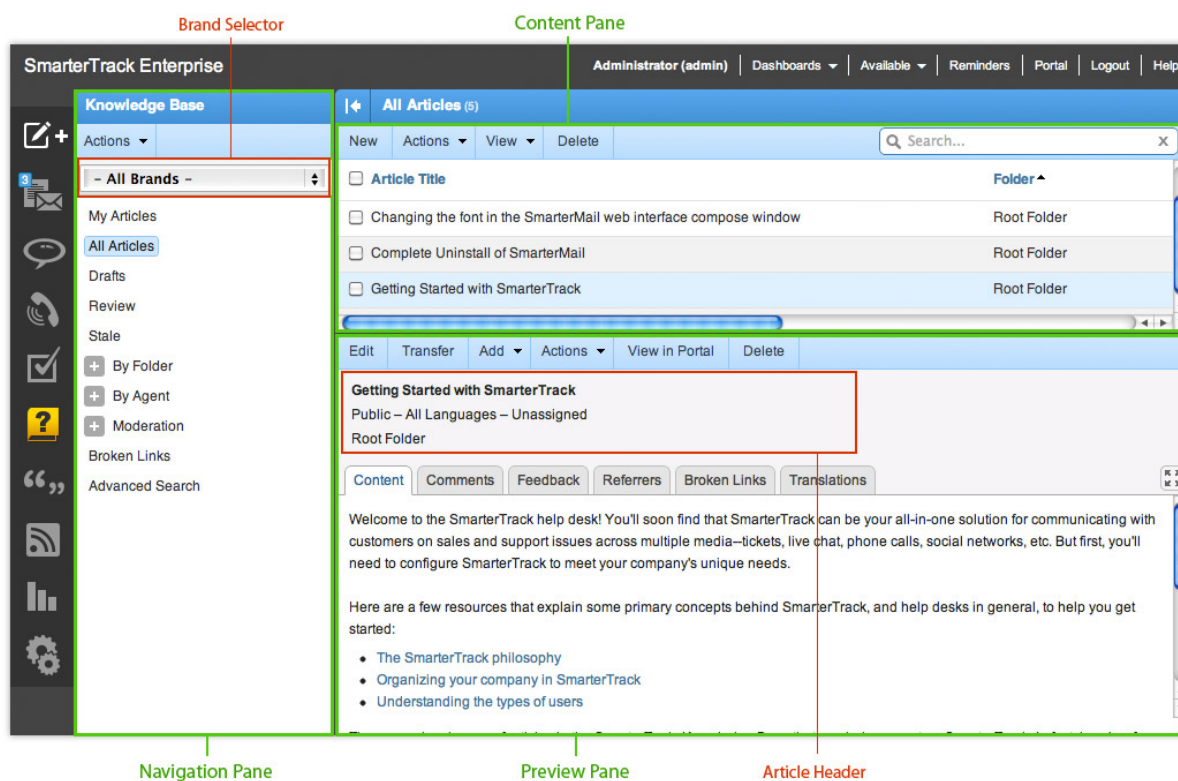
Tasks

To better understand the different areas of tasks, please refer to the diagram below:



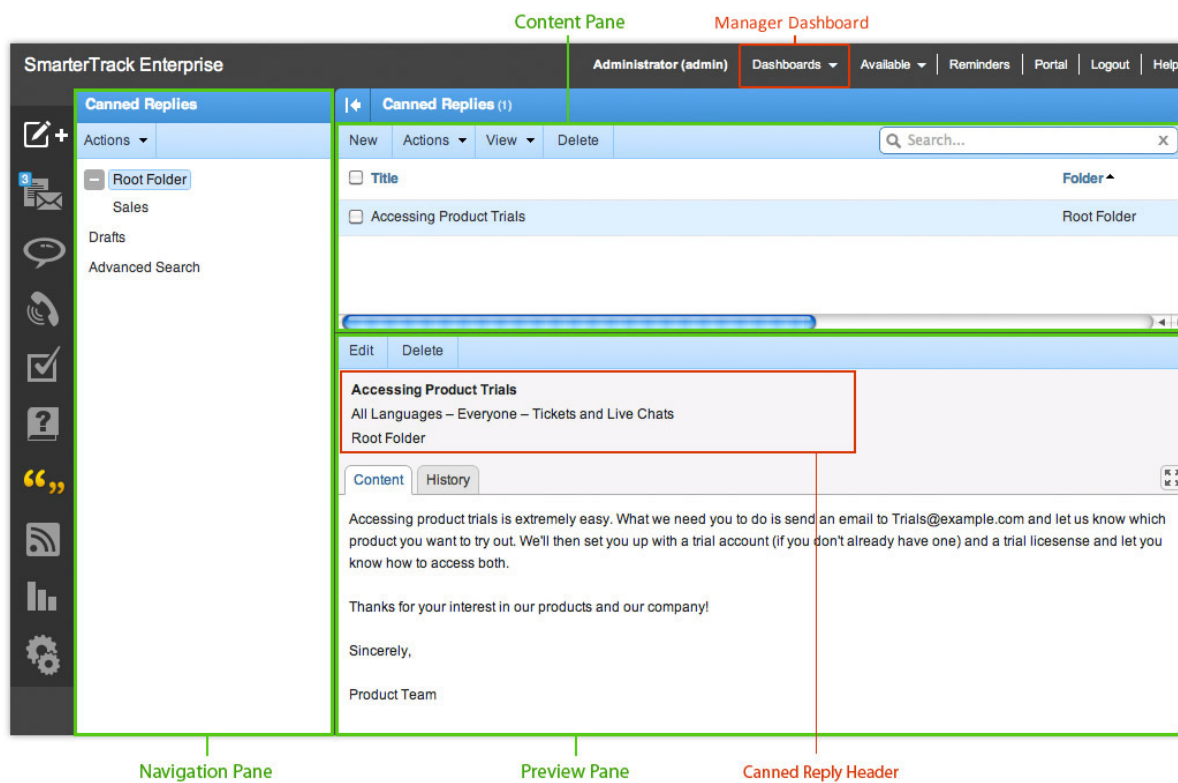
Knowledge Base

To better understand the different areas of the knowledge base, please refer to the diagram below:



Canned Replies

To better understand the different areas of canned replies, please refer to the diagram below:



News

To better understand the different areas of news items, please refer to the diagram below:

The screenshot shows the SmarterTrack Enterprise interface. The top navigation bar includes 'Administrator (admin)', 'Dashboards', 'Available', 'Reminders', 'Portal', 'Logout', and 'Help'. The left sidebar (Navigation Pane) lists 'News' and 'All Items'. The main content area (Content Pane) displays a list of news items, with one item selected: 'We are excited to announce our new Customer Service and Help Desk solution'. The right sidebar (Manager Dashboard) shows 'Available', 'Reminders', 'Portal', 'Logout', and 'Help'. The bottom section (Preview Pane) shows a detailed view of the selected news item, including its title, date, and content.

Labels in the diagram:

- Content Pane
- Manager Dashboard
- Navigation Pane
- Preview Pane
- News Item Header

Reports

To better understand the different areas of reports, please refer to the diagram below:

The screenshot shows the SmarterTrack Enterprise interface. The top navigation bar includes 'Administrator (admin)', 'Dashboards', 'Available', 'Reminders', 'Portal', 'Logout', and 'Help'. The left sidebar (Navigation Pane) lists 'Reports' and 'All Items'. The main content area (Content Pane) displays a list of reports, with one report selected: 'Agent-Group Activity'. The right sidebar (Manager Dashboard) shows 'Available', 'Reminders', 'Portal', 'Logout', and 'Help'. The bottom section (Report Header) shows a detailed view of the selected report, including its title, date range, and content.

Labels in the diagram:

- Content Pane
- Manager Dashboard
- Navigation Pane
- Report Header

Who's On

To better understand the different areas of Who's On, please refer to the diagram below:

The screenshot shows the SmarterTrack Enterprise 'Who's On' interface. The interface is divided into several sections:

- Manager Dashboard:** Located at the top right, it includes the user name 'John Darling (ldarling)', a dropdown menu currently set to 'Unavailable', and links for 'Reminders', 'Portal', 'Logout', and 'Help'.
- Navigation Pane:** Located on the left side, it contains a list of navigation items: 'Who's On', 'Density Map', 'Help', 'Order (1)', 'Order - Checkout', 'Pricing', 'SmarterMail (10)', 'SmarterNotify', 'SmarterStats', 'SmarterTrack', 'Account Management', 'Portal (13)', 'Ipswitch', 'Ipswitch 2', 'Interoffice', 'Forums', 'syentzer', and 'Spiceworks'.
- Content Pane:** The main area on the right, which is further divided into:
 - Who's On Header:** A sub-header area containing 'All Visitors (34)', 'Actions', 'View', and a search bar.
 - Table:** A table listing visitors with columns for 'Host Domain', 'Tracking Status', and 'Started At'. The table shows three entries: '63.170.64.2', 'office.logischpremedia.nl', and 'amedd.army.mil', all with a status of 'Active' and a start time of '10:12 AM'.
 - Print:** A section below the table showing details for a specific visitor: '0.011.0.111 (Coimbra, Coimbra, Portugal) - dsl.tele.pt'. It also shows session information: 'Anonymous User - 6/28/2012 9:58 AM - Duration 14m 56s | Idle 5m 11s' and 'Windows 7 / 2008 R2 / Firefox 15.0 / English (United States)'.
 - Page Summary:** A section below the print details showing 'Hits: 3' and a list of 'Initial Referrer' and 'Current Referrer' URLs.
 - Table:** A table showing page visit history with columns for 'Page', 'First Visited At', 'Last Visited At', and 'Total'. It shows two entries for 'Windows Mail Server | Secure Email Server | Exchange Server Alternative | SmarterMail' with visit times of '9:58:19 AM' and '10:05:39 AM'.

Labels with lines pointing to the corresponding areas in the screenshot are: 'Content Pane' (top center), 'Manager Dashboard' (top right), 'Navigation Pane' (bottom left), 'Preview Pane' (bottom center), and 'Whos On Header' (bottom right).

Settings

To better understand the different areas of settings, please refer to the diagram below:

SmarterTrack Enterprise

Administrator (admin) **Dashboards** Available Reminders Portal Logout Help

Settings | **Preferences**

Save

Options Roles Web Interface Tickets Live Chat VOIP Reporting Custom Fields

Username: admin

Authentication: Password

New Password:


Confirm Password:

Email Address:

Display Name: Administrator

Skin: Use Default (Default)

Time Zone: Use Default

Avatar: 

New Image: No file chosen

Images larger than 48x48 pixels will be automatically resized to fit.

Navigation Pane

- Configuration Tutorials
- Web Services
- My Settings
 - Preferences
 - My Events
 - Notification Profiles
- System Settings
 - General Settings
 - Notification Profiles
 - Setup
 - Organization
 - Custom Fields
 - Events
 - Globalization
 - Live Chats
 - Portal
 - Spool
 - Tickets
 - Who's On
 - Activation

Help for Users & Administrators

Logging in to SmarterTrack

SmarterTrack's Web interface 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.

Logging in to the Portal Interface

Customers, agents, and administrators can login to the portal interface via the portal website URL, which can be obtained from the SmarterTrack administrator. To log in to the portal, type the username and password in the appropriate fields and click Login .

Logging in to the Management Interface

Agents and/or administrators will need to obtain the link to the management interface login page from their SmarterTrack administrator. Alternatively, they can access this link from the Web portal. To log in to the management interface from the Web portal, click the Login button on the portal and enter the username and password in the appropriate fields and click Login . Then, from the user dropdown, select MManagement Interface . Note: Agents and/or administrators that wish to access the management interface may need to re-enter their login credentials, even if they are already logged in to the portal.

Logging in from Mobile Devices

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 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.

Active Groups

In order for a ticket or live chat to be assigned to an agent or for a VoIP call to make it to an agent's SmarterTrack Communicator, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets, live chats and/or have a VoIP account set up and active for the corresponding group. If all agents either are logged out or are not receiving tickets, live chats and/or calls through SmarterTrack Communicator, the ticket or live chat will be directed to the queue whereas phone calls will be handled based on the ruleset created inside the phone server. For this reason, it is imperative that agents check their status upon logging in or prior to logging out and ensuring they are active in the groups they are going to be working in.

The active groups popup gives agents the ability to quickly view the groups they belong to in live chat, tickets and VoIP calls. Agents can also start and stop activity within live chat, ticket and VoIP groups from this popup. If an agent is excluded from a particular communication method, "N/A" will appear next to the group name versus a checkbox.

To help make this process simple and automatic, the active groups popup displays in the management interface upon login. It can also be accessed at any time by clicking the Active Groups link in the Available/Unavailable menu item in the upper right corner of the management interface.

In general, the following columns will be available:

- Department - The name of the department. For example, sales, support, or billing.
- Group - The name of the group.
- Live Chats - If live chats are enabled for a group, this column will have a checkbox. To start receiving chats for a particular group, select the appropriate live chats checkbox. To stop receiving chats for a particular group, uncheck the appropriate live chats checkbox.
- Tickets - If tickets are enabled for a group, this column will have a checkbox. To start receiving tickets for a particular group, select the appropriate tickets checkbox. To stop receiving tickets for a particular group, uncheck the appropriate tickets checkbox.
- VoIP - If an agent is using SmarterTrack Communicator and a VoIP account is set up and enables for a group, this column will have a checkbox. To start receiving SmarterTrack Communicator VoIP calls for a particular group, select the appropriate VoIP checkbox. To stop receiving VoIP calls for a particular group, uncheck the appropriate VoIP checkbox.

Click OK to update the agent status.

Available/Unavailable

To temporarily stop receiving live chats, select Unavailable in the upper right corner of the management interface. When an agent is set to Unavailable, the link will display "Unavailable". Note: When agents set themselves to Unavailable, they will not receive any new live chats, but existing live chats will stay in their possession.

To begin receiving live chats again, select Available from the dropdown. If the link displays "Available," the agent can now receive new live chats.

Active Groups can also be set from this dropdown. When clicked, Agent Status brings up the Agent Status popup that is normally displayed when an agent logs in to SmarterTrack. Agents can then set their active status as needed.

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.

Tickets

Tickets Overview

SmarterTrack's ticket feature provides businesses with a powerful information distribution system that gives agents total control of all related communications, including emails, notes, and associated live chats. To access your tickets, click the tickets icon . Depending on the role you are assigned, only My Tickets will load or My Tickets and Global Tickets will load.

For help understanding the different areas of the tickets section, see the tickets interface diagram .

For more detail on the ticketing interface, see the View Ticket section of help.

Navigating SmarterTrack's Ticket Interface

My Tickets vs. Global Tickets

The My Tickets section of SmarterTrack organizes all of the tickets for which a particular agent is responsible. When an agent accesses My Tickets by clicking it in the navigation pane, all active tickets for the agent will load in the content pane. If there are active tickets waiting for the agent's attention, a number will be listed in parentheses next to the Active menu item. My Tickets also gives agents the ability to see any Waiting and Closed (and Closed and Locked) tickets that they have responded to.

Administrators and managers who are members of multiple groups may want to view tickets in the SmarterTrack system coming into those groups to better evaluate the actual ticket needs of the organization or to gain valuable insight into company operations. To view all tickets in SmarterTrack, an agent, manager or administrator **MUST** be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see tickets and live chats for those groups. Once this is done, they simply click Global Tickets in the navigation pane.

Regardless of whether you're accessing My Tickets or Global Tickets, all active tickets in the system will load in the content pane when you open the respective ticket section. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- Status - The current status of the ticket. The status column includes:
 - Whether a ticket is Active, Waiting, Closed or Closed and Locked
 - The follow-up status of the ticket. Note: Tickets scheduled for follow-up will appear as Waiting.

- The priority level of the ticket - low, normal, high or urgent.
- Whether the ticket is pinned to the agent. Pinning a ticket to an agent means that agent will always be assigned the ticket, regardless of the ticket distribution method used. For more information on ticket distribution methods, see [Adding Groups](#) .
- Subject - Similar to the subject line of an email, this is a user-generated phrase that usually describes the ticket. The subject phrase is entered by the user (customer) when the ticket is submitted. Very long subject phrases are truncated.
- Email - The email address of the individual that submitted the ticket.
- Department - The department that is assigned to this ticket.
- Group - The group that is assigned to this ticket.
- Agent - The agent that is assigned to this ticket.
- Priority - The priority level of the ticket.
- Messages - The number of emails that have gone back and forth between the agent and customer.
- Idle - The amount of time that has passed since a ticket action has occurred.

Sorting

Clicking on any column header allows you to sort that column in either ascending or descending order. Final sort order uses the ticket's idle time as the deciding factor. For example, 10 tickets from the same customer will sort from least idle to most idle, or vice versa, when sorting the Email column in either ascending or descending order. In terms of the Status column, tickets sort from left to right, meaning they sort by status, then whether a follow-up is scheduled, then the ticket's priority, then whether it is pinned to an agent (or vice versa, depending on an ascending or descending sort order). Even in this scenario, however, idle time is the last item used to determine the eventual sort order.

Performing Ticket Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new ticket. For more information, see [Creating New Tickets](#) .
- Actions - Click this button and select the appropriate option to transfer tickets, mark tickets for follow-up or change the status or priority of tickets. Setting options such as Status, Follow-up, Priority and Pin will display as an icon in the Status column of the content pane. Each icon will have a color assigned based on the severity level of the setting. Generally, colors denote the following:
 - Grey - Low priority, no follow-up or pin.
 - Green - Active status or normal priority.

- Yellow - Waiting status or follow-up scheduled but not overdue.
 - Red - Closed status, high priority or follow-up past due.
 - Red with Exclamation Point (Priority only) - Urgent priority.
 - Red with lock (Status only) - Closed and locked.
 - Blue (Pin only) - Pinned to agent.
-
- Select All - Selects all of the tickets in the content pane.
 - Transfer - Transfers the selected ticket(s) to another group or agent. For more information on transferring a ticket, see [Transferring Tickets](#).
 - Status - To change the status of a ticket or to pin a ticket, select the appropriate option:
 - Active - Choosing this option will mark all selected tickets as active. Generally, a ticket would be marked active when an agent is working on it.
 - Waiting - Choosing this option will mark all selected tickets as waiting. Generally, a ticket is marked as waiting when the agent is waiting for a customer reply or action. tickets marked as waiting will not appear in the active tickets section and may be set to close automatically. Note: The administrator sets the length of time a ticket will remain in waiting status before it auto-closes.
 - Closed - Choosing this option will mark all selected tickets as closed. Generally, a ticket is marked as closed when the agent has resolved the customer's issue.
 - Closed and Locked - Choosing this option will mark all selected tickets as closed and prohibits the customer from reopening the ticket. This option is generally used if a customer has a tendency of reopening existing tickets when new tickets should be created. Note: If the ticket message is bounced, the ticket will return to active status. For example, after responding to a ticket, an agent may mark the ticket as closed and locked. If that ticket response is undeliverable, the system will receive a non-delivery report and the ticket will revert to active status.
 - Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option:
 - Schedule - Choosing this option will assign a timeframe for which the agent will follow up on the ticket. When a ticket is ready for follow up, SmarterTrack automatically moves it to active status.
 - Remove - Choosing this option will remove any follow-up assigned to a ticket. The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up.
 - Priority - To change the priority level of a ticket, select the appropriate option:
 - Low - The selected tickets have a low priority and will be sorted toward the bottom of the lists.

- Normal - The selected tickets have a normal or unspecified priority level.
- High - The selected tickets are a high priority and will be sorted toward the top of the lists.
- Urgent - The selected tickets are very important and will show at the top of the lists.
- Pin - To pin or unpin the selected ticket(s), select the appropriate option. Note: Tickets cannot be pinned unless they are in an active group. Therefore, tickets in the queue cannot be pinned to an agent.
- Pin Ticket - Choosing this option will ensure that the ticket will not be assigned to another agent. A pinned ticket will remain assigned to you even if you log out and hand-off your tickets. If a ticket is pinned, all correspondence relating to the ticket will be assigned to you, regardless of your status. Note: If the administrator enables automatic ticket rebalancing, pinned tickets may be reassigned.
- Unpin Ticket - Choosing this option will allow the ticket to be assigned to another agent.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.
- Visible Fields - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
- Delete - Click this button to delete the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .

Active Ticket Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. Managers can view and edit the status of agents within each group from the Active Ticket Groups area of the tickets section of the management interface.

Viewing Tickets

Depending on your role, a list of all active tickets in the system or all active tickets to which you are assigned will load in the content pane upon login. To view the contents of a ticket, simply click the

desired ticket and it will load in the preview pane. If you would rather view the ticket in a pop-up window, double-click the ticket instead.

In general, the following options are available from the preview pane toolbar:

- **Take** - This option is available if an agent is a part of a ticket group but does not have possession of the ticket. It allows an agent to "take" a ticket and make it an active issue in their queue.
- **Reply** - Allows the agent to compose a reply to the ticket. For more information on replying to a ticket, see [Replying to Tickets](#) .
- **Reply All** - Allows the agent to compose a reply to all of the emails listed in the To field of the ticket.
- **Transfer** - Transfers the ticket to another group or agent. For more information on transferring a ticket, see [Transferring Tickets](#) .
- **Add** - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the ticket.
- **Comment** - Adds a note or a resolution to the ticket. When an agent adds a resolution to a ticket, this information is stored in a searchable database that can be used to quickly and efficiently resolve a ticket issue. Ticket comments and resolutions are only visible to agents and managers. Users can not see comments or resolutions.
- **Resolution** - Similar to a comment, a resolution is a finalization of the ticket that will be seen as resolved tickets (see below) when tickets of a similar nature are received.
- **Attachment** - Attaches a file to the ticket. When an agent adds a file to a ticket, this information is stored in the Related Items and Communication tabs of the ticket.
- **Task** - Attaches a new task to the ticket. When an agent adds a task to a ticket, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- **Time Log** - Attaches a new time log to the ticket. When an agent adds a time log to a ticket, this information is stored in the Time Logs tab.
- **Call Log** - Attaches a new call log to the ticket. When an agent adds a call log to a ticket, this information is stored in the Related Items tab.
- **Related Item** - Adds an existing ticket, call log or live chat to the ticket. When an agent adds a related item to a ticket, this information is stored in the Related Items tab.
- **Actions** - Click this button and select the appropriate option to mark the ticket for follow-up, change the status or priority of the ticket, view user details, get assistance or print the ticket.
- **Status** - To change the status of a ticket or to pin a ticket, select the appropriate option. For information on the different status types, see [Tickets Overview](#) .
- **Follow-up** - To schedule or remove a follow-up for a ticket, select the appropriate option. For

more information on follow-ups, see [Scheduling Tickets for Follow-up](#) .

- **Priority** - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see [Tickets Overview](#) .
- **Pin** - To pin or unpin the ticket, select the appropriate option.
- **Manual Events** - At the bottom of the Actions are listed any manual events an agent has created that can be performed against the selected ticket. For more information, see the [Events Overview](#) page of the online help.
- **Assistance** - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.
- **Knowledge Base Articles** - Displays a list of knowledge base articles that may be related to the selected ticket. Agents can use search terms to find the knowledge base article that best relates to the ticket.
- **Resolved Tickets** - Displays a list of resolutions that may be related to the selected ticket. Agents can use search terms to find the resolution that best relates to the ticket.
- **Instant Message** - Allows the agent to IM another agent, supervisor or administrator that is logged into SmarterTrack.
- **Delete** - Click this button and select the appropriate option to delete tickets.
- **Delete** - Deletes the selected ticket(s). For more information on deleted tickets, see [Deleting Tickets](#) .
- **Print** - Prints the information contained in the communication, custom fields, and details tabs of the ticket. Note: If viewing the management interface from a mobile device, this option may not be available. Tabs within the Ticket

Ticket information is organized within the following tabs:

- **Communication** - This tab includes all correspondence and comments pertaining to the ticket, with the most recent communications listed first. Agents collapse or expand correspondence using the icons on the top right corner of each communication. Note: By default, only the 15 most recent items will display when an agent views the ticket. To see all communication items, click the button to view additional items at the bottom of the ticket.
- **Comments** - This tab displays any comments agents would like to note about the ticket or customer. Comments are only visible to agents.
- **Attachments** - This tab lists any files that were uploaded to the ticket by an agent or customer.
- **Time Logs** - This tab lists any time logs attached to the ticket.
- **Related Items** - This tab lists any tickets, live chats, call logs, time logs, tasks or files attached to the ticket.
- **Custom Fields** - This tab includes any custom fields the administrator created to help

customize your company's tickets. This information can be populated by a user, an agent, or a third-party application (via the administrator).

- History - This tab summarizes any actions associated to the ticket. Navigation Arrows and Message Options

At the right side of each message within a ticket are three icons:

- Open in New Window - Opens the entire ticket thread in a separate window. This is extremely beneficial for tablet users or for smaller desktop displays as it allows for the use of more screen real estate.
- Up arrow - When viewing a ticket thread, clicking this moves you up to the more recent message within that thread. Note: the up arrow will only display if a ticket thread consists of two or more messages.
- Down arrow - When viewing a ticket thread, clicking this moves you to the next message in a ticket thread.
- Gear icon - Clicking this offers different options, depending on the type of message that is being viewed. Generally, these options are:
 - Show HTML - For incoming OR outgoing messages, allows you to view the pure HTML of the message. While the Preview Pane will only display information that is generated from within SmarterTrack, and standard-format HTML messages that are sent to SmarterTrack, the Show HTML option will display non-standard HTML encoding. For example, emails that are generated from a third-party product, like a billing application, but that have a reply-to address that sends the email into SmarterTrack. While the billing application email may not display in the preview pane, it WILL display when you select the Show HTML option.
 - Reply With Copy - For outgoing messages only, allows you to reply to a specific message within a ticket thread and copies that message in the reply.

Viewing the Ticket Header

Looking at the primary email ticket interface diagram , you'll see a section labeled "Ticket Header". There are several critical pieces of information contained within the ticket header as well as some actions available for a user's email address that should be discussed.

A ticket's header is laid out as follows:

- Line 1 : Ticket Number - Ticket Status - Ticket Priority
- Line 2 : User (User's Email Address) - Date/Time Ticket Submitted - Duration - Idle Time
- Line 3 : Department Assigned/Group Assigned/Agent Assigned

Regarding the User and the User Email Address, in many instances you'll notice the user's email address has a dotted underline. When you mouse over an email address with a dotted underline, a couple of options appear:

- **User Details** - User Details will open a pop-up window that displays a variety of data about the user. For example, the user's role in SmarterTrack, a list of any tickets started from that email address, any live chats started from that email address, any call from a user with that email address and if any custom fields are associated with the user, those are displayed as well. Also available are tabs for ticket history and customer statistics, which includes information on the number of tickets, live chats, calls and time logs over specific periods of times. Custom fields can be associated with any user, and, if present, any agent or manager can view them by selecting "User Details" from the email address mouseover.
- **Edit Email Address** - This allows you to edit the email address for future correspondence on this ticket.

Viewing Tickets in the Queue

On occasion, tickets are directed to the queue instead of directly to an agent. Generally, this happens because all agents for a group are either logged out or are not receiving tickets, the ticket limit for an agent (or for all agents) has been reached or the ticket distribution method for the group is set to Cherry Picking. Regardless of the reason, if agents can not receive tickets then they will go directly to the ticket queue. To view tickets in the queue, expand Queue in the navigation pane and select the desired status. All tickets with the selected status will load in the content pane.

Viewing Tickets by Status

Generally, tickets are organized into different sections depending on whether they are active, waiting for a customer response, or are closed. To view tickets by status, click the tickets icon , expand Global Tickets or My Tickets in the navigation pane and select the desired status. All tickets with the selected status will load in the content pane.

Viewing Tickets by Brand

To view tickets by brand, click the tickets icon and at the top of the navigation pane a dropdown is available. Clicking on the dropdown allows you to select a specific brand and view the tickets for that brand. Agents can then select the type of tickets they want to view (options include active, waiting, and closed tickets) for whatever department and group they're a part of. Note: Agents can only view the tickets for which they are responsible. Managers can only view the tickets for the groups/departments in which they belong.

Viewing Tickets By Agent

To view tickets by agent, click the tickets icon , expand By Agents and click the appropriate agent in the navigation pane. All active tickets for the selected agent will load in the content pane. Managers can also expand the agent and select the type of tickets they want to view (options include active, waiting, and closed tickets). Note: The ability to view tickets by agent is only available to managers using installations with less than 500 agents. In addition, managers can only view tickets for the groups/departments in which they belong.

Viewing Deleted Tickets

The Deleted Tickets section is a list of all tickets that have been deleted by an agent. To view deleted tickets, click the tickets icon and click the Deleted Items in the navigation pane. All deleted tickets will load in the content pane. For more information on deleted tickets, see Deleting Tickets . Note: Agents can only view the tickets for which they are responsible. Managers can only view the tickets for the groups/departments in which they belong.

Replying to Tickets

To respond to a ticket, click Reply in the preview pane toolbar. This will open a ticket response window that the agent will use to compose an email response to the customer. Alternatively, the agent may want to reply to all recipients of the ticket (those listed in the To, Cc and Bcc fields). To do so, click Reply All in the preview pane toolbar.

When replying to a ticket, SmarterTrack automatically fills in the address fields with the email address(es) of the recipient(s) from the last ticket message, the subject field with the subject from the original ticket message and the text box with the ticket correspondence thus far.

Composing a Ticket Response

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

The following fields will appear in the header of the ticket:

- To - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should auto-fill this field. If the ticket will be sent to multiple people, separate email addresses with a semi-colon.
- Cc - The email address of any individuals that should receive a copy of the ticket response. If the ticket will be copied to multiple people, separate email addresses with a semi-colon.
- Bcc - The email address of any individuals that should receive a blind carbon copy of the

ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semi-colon.

- **Subject** - The subject of the message. If the agent is replying to a ticket, SmarterTrack should auto-fill this field.

Type the text of the ticket response in the large editing box below the ticket header. Agents can change the formatting using the WYSIWYG editor. .

The following options are available in the toolbar of the ticket response window:

- **Send** - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; Send and Schedule Follow-up; or Send and Transfer. For more information about the different options, see [Tickets Overview](#) .
- **Save as Draft** - Saves a draft of the ticket response. SmarterTrack will automatically save drafts of ticket responses, but agents can opt to save a draft of a completed response for any reason, such as pending additional information or review by a supervisor. Note: There can be only one draft per ticket. If there is a draft response for a ticket already, and another draft is created for the same ticket response, the original draft will be overwritten.
- **Attach Files** - Adds an attachment that is included with any response to the ticket. This is a good way to send instructional documents, screenshots, whitepapers or other files to customers and end users. In order to attach files, you will need to specify the file types allowed. More information can be found on the [General Settings help page](#).
- **Add** - Adds a comment, resolution, task, time log, call log or other related item to the ticket. These items are NOT included in the ticket response, but rather are internal to the help desk and used by agents and managers. For more information about the different options, see [Viewing Tickets](#) .
- **Actions** - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.
- **Priority** - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see [Tickets Overview](#) .
- **Pin** - To pin or unpin a ticket, select the appropriate option.
- **Insert Canned Reply** - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.
- **Manual Events** - If any manual events were created for ticket replies, they will appear at the bottom of the Actions menu.
- **Assistance** - To view relevant resolutions or knowledge base articles or to get assistance

(instant message) from another agent, select the appropriate option. For information on the different types of assistance, see [Tickets Overview](#) .

Transferring Tickets

On occasion, an agent may need to transfer a ticket to another agent or group. There are various reasons why a ticket may be transferred. For example, a level 1 tech support agent may need to escalate the ticket to a more experienced level 2 agent for resolution. As another example, an incorrectly categorized ticket, such as a support ticket that was incorrectly submitted as a sales ticket, may need to be rerouted to the correct department. Note: The ability to transfer tickets is determined by the role permissions. By default, agents can transfer tickets. For more information, see [Roles](#) .

To transfer a ticket, select the ticket and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the ticket in the preview pane. This will open a pop-up window with the following fields:

- Instance - Select the SmarterTrack installation to which the ticket should transfer from the list. Note: This field is only available if the administrator has enabled cross-installation ticket transferring in Ticket Settings .
- Brand - The primary brand the ticket should be transferred to.
- New Group - Select the group to which the ticket should transfer from the list.
- New Agent - Select the agent to which the ticket should transfer from the list. If the ticket does not need to transfer to a specific agent, choose the auto-assign option and the ticket will be assigned to an agent within the specified group based on the distribution method set by the administrator.
- New Priority - Select the priority of the ticket. Generally, an agent will not change the ticket priority.
- New Status - Select the status of the ticket. Generally, an agent will want to mark a transferred ticket as active.
- Pin Ticket - Check this box to pin the ticket to the agent receiving the ticket. For more information on pinning tickets, see [Tickets Overview](#) .
- Transfer Note - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the ticket was transferred.

Click OK to transfer the ticket. Note: When a ticket is transferred, idle time is not reset for the new agent. However, agent response time IS reset. Therefore, the new agent's initial response time is calculated based off of when they received the transfer.

Scheduling Tickets For Follow-up

One method for managing tickets in SmarterTrack is by scheduling them for follow-up. For example, if an agent needs to do additional research to resolve a customer's issue, he can schedule the ticket for follow-up to ensure it is not forgotten. Similarly, follow-ups can be used to notify agents when customers haven't responded to a ticket or need additional service. When a ticket is scheduled for follow-up its status changes to "waiting." It then automatically becomes "active" on the scheduled day and time.

To schedule a ticket for follow-up, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Schedule . The follow-up options will load in a popup window. In general, the following options are available:

- Follow Up On - Use the calendar and clock icons to select the date and time the agent should follow up on the ticket. When this date/time arrive, SmarterTrack will automatically move the ticket to active status to remind the agent to follow-up.
- New Group - Select the group to which the follow-up should be assigned to.
- New Agent - Select the agent to which the follow-up should be assigned to. If the follow-up does not need to be assigned to a specific agent, choose the auto-assign option and the follow-up will be assigned to an agent within the specified group based on the distribution method set by the administrator. By default, the agent who schedules the follow-up will be assigned the follow-up.
- Pin Ticket - Check this box to pin the ticket to the agent responsible for the follow-up. For more information on pinning tickets, see Tickets Overview .
- Follow-up Note - Type any important information or comments regarding the follow-up into this field. Generally, follow-up notes describe actions taken and/or the reason the ticket was scheduled for follow-up.

Follow-ups and Agent Status

When an agent sets a follow-up, that follow-up stays with that agent and moves from waiting to active status at the follow-up's scheduled date and time. This occurs regardless of the agent's actual status within SmarterTrack. For example, a ticket that has a follow-up scheduled will move to an active status for an agent even if the agent it is assigned to is marked as inactive. Therefore, managers and supervisors will need to be aware of how follow-ups are utilized so that, in cases where an agent is inactive due to sickness or vacation, any follow-ups are distributed to active agents, as needed.

Finding Tickets Scheduled for Follow-up

When an agent schedules a ticket for follow-up, SmarterTrack automatically assigns a waiting status to the ticket. To view all tickets scheduled for follow-up, expand Global Tickets or My Tickets in the navigation pane and click Waiting . Waiting tickets scheduled for follow ups will have a yellow Follow-up icon in the Status column. Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status.

Removing a Follow-up from Tickets

To remove a follow-up assigned to a ticket, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Remove . The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up. Note: SmarterTrack also removes any follow-ups assigned to a ticket if the ticket status is changed to closed and locked or if the ticket is deleted.

Creating New Tickets

On occasion, an agent may need to create an outgoing ticket that is sent to the customer. For example, if a customer calls on the phone and requests information, the agent may create a ticket that includes the requested information, send it to the customer, and mark the ticket closed. This also ensures that the request is documented.

Conversely, an agent may need to create an incoming ticket on behalf of the customer. For example, if a customer calls in and is away from a computer or email client and needs an issues submitted to a specific department about an issue they're having. The agent will create a ticket as if the customer were sending it in so that it can be worked on and communication sent back to the customer with information or a potential resolution to the issue.

To create a new ticket, click the new item icon and then click Ticket . Alternatively, an agent can click on the New button in the tickets content pane. By default, the brand and the department will automatically match the group that is selected in the ticket tree. Regardless of the method used, a new ticket window will open that the agent will use to compose an email to the customer or to the ticketing system.

Composing a Ticket Message

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

The following fields will appear in the header of the ticket:

- **Brand** - The primary brand the ticket should be created for.
- **Group** - The Group to assign the ticket to, then the agent that should receive the ticket once it gets to the appropriate group. While a Group is required, it is possible for the ticket to be auto-assigned to an agent using whatever distribution method is in place for the Group.
- **Incoming Ticket** - Select this option will create an incoming ticket. That means that the To and From fields are essentially reversed so that the ticket appears to be originated from the customer rather than from the support agent.
- **To** - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should auto-fill this field. If the ticket will be sent to multiple people, separate email addresses with a semi-colon.
- **Cc** - The email address of any individuals that should receive a copy of the ticket response. If the ticket will be copied to multiple people, separate email addresses with a semi-colon.
- **Bcc** - The email address of any individuals that should receive a blind carbon copy of the ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semi-colon.
- **Subject** - The subject of the message. If the agent is replying to a ticket, SmarterTrack should auto-fill this field.

Type the text of the ticket response in the large editing box below the ticket header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the toolbar of the ticket response window:

- **Send** - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; or Send and Schedule Follow-up. For more information about the different options, see [Tickets Overview](#) .
- **Attach Files** - Adds an attachment to the ticket response that goes to the customer.
- **Add** - Adds a comment, resolution, task, time log, call log or other related item to the ticket. For more information about the different options, see [Viewing Tickets](#) .
- **Actions** - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.
- **Priority** - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see [Tickets Overview](#) .
- **Pin** - To change the pin status of a ticket, select the appropriate option. For more information about the different options, see [Tickets Overview](#) .
- **Insert Canned Reply** - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.

- Manual Events - If there are any manual events created for new ticket creation, they will appear at the bottom of the Actions menu.

Tickets in Queue

On occasion, tickets are directed to the queue instead of an agent. Generally, there are three reasons why this occurs:

- In order for a ticket to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets for the corresponding group. If all agents either are logged out or are not receiving tickets, the ticket will be directed to the queue.
- Administrators have the ability to set ticket limits for agents. If that limit is reached, new tickets will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the administrator may set SmarterTrack to limit agents to five active tickets. Once an agent's active ticket load falls below five, the system will assign additional tickets based on the chosen distribution method.
- If a group is set with the Cherry Picking from Queue ticket distribution method, tickets will sit in the queue until selected by an agent versus being automatically assigned to an agent.

For information about how SmarterTrack assigns tickets from the queue, see [Ticket Distribution Methods](#) .

Deleting Tickets

The ability to delete a ticket is determined by the role permissions. By default, agents cannot delete tickets. For more information, see [Roles](#) .

To delete a ticket, simply select the desired ticket(s) in the content pane. Then click the Delete menu in the content pane toolbar. Alternatively, agents can delete a ticket they are currently viewing by clicking the Delete menu in the preview pane toolbar. Regardless of the method used, when an agent deletes a ticket they are presented with a confirmation dialog. Once a ticket is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Tickets

As time passes, finding a specific ticket can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tickets quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the the messages within the area of the tickets section you are viewing (i.e. active, waiting, closed, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a ticket. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all ticket items EXCEPT deleted items or to only search in deleted items.
- Ticket Number - To search by ticket number, enter the ticket number in this field.
- Search String - Type the specific keywords to be queried. The body, subject, and notes sections of tickets will be searched for these keywords.
- Subject - To search by ticket subject, type the subject in this field.
- Email Address - To search by email address, enter the email address in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by ticket status, select the appropriate status from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Spool

All incoming and outgoing SmarterTrack messages are processed through the spool. If your email server is down, messages in the spool will retry at regular intervals until it comes back up.

Administrators can manage incoming and outgoing messages in the spool, retry failed messages, delete failed messages, or view the raw content of any message. To manage the spool, click the tickets icon . Then expand Spool in the navigation pane and select Outgoing (for sent messages) or Incoming (for received messages).

The following options are available from the content pane toolbar:

- Retry - Retries a failed message.
- View - Allows the administrator to view the raw content of the selected message.
- Delete - Permanently deletes the message(s) from the system.
- Refresh - Refreshes the content pane.

Live Chat

Live Chat Overview

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, improve customer support and assist more customers concurrently. (E.g., via live chat, tickets and phone calls).

Customers can initiate live chats via the portal or directly from your website using customized live chat links. As agents receive live chat requests, SmarterTrack suggests solutions from relevant knowledge base articles and ticket resolutions, thereby reducing research time and improving overall response times. To access your live chats, click the live chat icon . Depending on the role you are assigned, only My Tickets will load or My Tickets and Global Tickets will load.

On the user's end, as they initiate the live chat process, after their initial questions are submitted they are presented with an intermediary page that lists a number of suggested solutions from relevant knowledge base articles within SmarterTrack. This can help keep support functions streamlined and concentrated by allowing the customer to see potential resolutions to their issues before the chat is submitted to an agent.

For help understanding the different areas of the live chat section, see the live chat diagram .

For more detail on the live chat interface, see the View Chat section of help.

Navigating SmarterTrack's Live Chat Interface

My Live Chats vs. Global Live Chats

The My Live Chats section organizes all of the live chats for which an agent is responsible. When an agent accesses My Live Chats by clicking on it in the navigation pane, all active live chats for the agent will load in the content pane. My Live Chats also gives agents the ability to see any inactive chats that they have previously had with end users.

In addition, the My Live Chats section organizes chats by group. That means that every group the agent is active in will be listed and the agent can drill down into each group to see their active and inactive chats.

Administrators and managers who are members of multiple groups may want to view active and/or inactive live chats for those groups those groups to better evaluate the actual needs of the organization or to gain valuable insight into company operations. To view all live chats in SmarterTrack, an agent, manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see live chats for those groups. Once this is done, they simply click Global Live Chats in the navigation pane.

Regardless of whether you're accessing My Live Chats or Global Live Chats, all active and inactive chats in the system will load in the content pane when you open the respective live chat section. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- **Checkbox** - Use these boxes to select multiple chats. Live chats must be selected before choosing an action from any toolbar.
- **Status** - The current status of the live chat and whether a follow-up was scheduled or not.
- **User** - The name the customer would like to be called during the chat.
- **Group** - The group to which the live chat was assigned.
- **Started** - The date and time the chat originally started.
- **Queue Time** - The amount of time the live chat was in the queue before it was taken by, or assigned to, and agent.
- **Idle** - The amount of time that passed since an agent sent a message within the chat. Note: Idle time does not reset when a customer sends a message.
- **Messages** - The number of messages within the chat.
- **Agent** - The name of the agent assigned to the chat.

Sorting

Clicking on any column header allows you to sort that column in either ascending or descending order. Final sort order uses the chat's idle time as the deciding factor. For example, 3 chats from the same customer will sort from least idle to most idle, or vice versa, when sorting the User column in either ascending or descending order.

Performing Live Chat Actions

In general, the following options are available from the content pane toolbar:

- **Actions** - Click this button and select the appropriate option to select all chats, pull a live chat from the queue or transfer a live chat. Setting options such as Status, Follow-up and Idle Time will display as icons in the Status column of the content pane. Each icon will have a color assigned based on the severity level of the setting. Generally, colors denote the following:
 - Grey - No idle time issues.
 - Green - Active status or normal idle.
 - Yellow - Idle warning.
 - Red - Closed/inactive status, high idle warning.
- **Select All** - Selects all chats within the content pane.
- **Transfer** - Transfers the selected chat(s) to another group or agent. For more information on transferring a live chat, see [Transferring Live Chats](#).
- **View** - Click this button and select Visible Fields.
 - **Visible Fields** - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
 - **Delete** - Click this button to delete the selected live chat(s). For more information on deleted chats, see [Deleting Live Chats](#).

Active Live Chat Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. Managers can view and edit the status of agents within each group from the Active Live Chat Groups area of the live chats section of the management interface.

The Active Live Chats Groups page gives managers the ability to view the following information:

- A list of all agents
- The status of each agent
- The number of active live chats assigned to each agent
- The number of active live chat groups
- The total number of live chat groups that the agent belongs to

To access this information, click the live chat icon , then click Active Live Chat Groups in the navigation pane.

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 more information on agent status, see Agent Status .

Viewing Live Chat

To view a live chat, simply click the desired chat and it will display in the preview pane. If you would rather view the chat in a popup window, double-click the chat instead. Note: Agents can also configure SmarterTrack so that new chats automatically open in a popup window when they are received. For more information, see Preferences .

In general, the following options are available from the preview pane toolbar:

- End Chat - Ends the live chat session.
- Take - Allows an agent to take a live chat, either from the queue or from another agent, and begin actively replying to the end user.
- Transfer - Transfer the live chat to another group or agent.
- Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the live chat.
- Comment - Adds a note or a resolution to the live chat. When an agent adds a resolution to a chat, this information is stored in a searchable database that can be used to quickly and efficiently resolve a live chat issue.
- Task - Attaches a new task to the live chat. When an agent adds a task to a chat, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.

- Time Log - Attaches a new time log to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Ticket - Attaches a new ticket to the chat. When an agent adds a time log to a live chat, this information is stored in the Related Items tab.
- Related Item - Adds an existing ticket to the chat. When an agent adds an existing item to a live chat, this information is stored in the Related Items tab.
- Actions - Click this button and select the appropriate option to perform any manual events created for live chats.
- Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted in the live chat response.
- Manual Event - If there are manual events set up for live chats, they will appear at the bottom of the Actions menu. Otherwise, 'No manual events available' will appear.
- Assistance - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.
- Knowledge Base Articles - Displays a list of knowledge base articles that may be related to the selected live chat. Agents can use search terms to find the knowledge base article that best relates to the chat.
- Instant Message - Allows the agent to IM another agent, supervisor or administrator that is logged into SmarterTrack. Using the Instant Message features allows an agent to get assistance from another agent, a supervisor or someone else within the company.
- Spell Check - SmarterTrack allows agents to spell check their responses prior to sending it to the user. Click this to spell check your response.
- Close - Closes the live chat. Note: If the live chat is active, clicking Close will close the active chat and disconnect the users. Therefore, it's not a good idea to close active chats without first ending the chat with the customer.
- Print - Allows the agent to print the information contained in the chat, custom fields, and details tabs of the live chat. Note: If viewing the management interface from a mobile device, this option may not be available.

Tabs within the Live Chat

Live chat information is organized within the following tabs:

- Conversation - This displays the text of the live chat as well as any custom fields being used.
- Comments - This tab displays any comments agents would like to note about the chat or customer. Comments are only visible to agents.
- Attachments - This tab lists any files that were uploaded to the chat by an agent or customer.

- Time Logs - This tab lists any time logs attached to the live chat.
- Related Items - This tab lists any tickets, time logs, tasks or files attached to the ticket.
- Custom Fields - This tab includes any custom fields the administrator created to help customize your company's chats. This information can be populated by a user, an agent, or a third-party application (via the administrator).
- History - This tab summarizes any actions associated to the chat.

Viewing the Live Chat Header

Looking at the primary live chat interface diagram , you'll see a section labeled "Live Chat Header". There are several critical pieces of information contained within the live chat header as well as some actions available for a user's email address that should be discussed.

A live chat's header is laid out as follows:

- Line 1 : Live Chat Number - Chat Status - Location Information
- Line 2 : User (User's Email Address) - Date/Time Live Chat Submitted - Chat Duration
- Line 3 : Department Assigned/Group Assigned/Agent Assigned

Regarding the User and the User Email Address, in many instances you'll notice the user's email address has a dotted underline. When you mouse over an email address with a dotted underline, a couple of options appear:

- User Details - User Details will open a pop-up window that displays a variety of data about the user. For example, the user's role in SmarterTrack, a list of any tickets started from that email address, any live chats started from that email address, any call from a user with that email address and if any custom fields are associated with the user, those are displayed as well. Also available are tabs for ticket history and customer statistics, which includes information on the number of tickets, live chats, calls and time logs over specific periods of times. Custom fields can be associated with any user, and, if present, any agent or manager can view them by selecting "User Details" from the email address mouseover.
- Edit Email Address - This allows you to edit the email address for future correspondence on this live chat.

Viewing Live Chats by Status

Generally, live chats are organized into different sections depending on whether they are active or inactive. To view live chats by status, click the live chat icon , expand Global Live Chats or My Live Chats in the navigation pane and select the desired status. All live chats with the selected status will load in the content pane.

Viewing Live Chats by Brand

To view live chats by brand, click the live chat icon and click the appropriate brand in the navigation pane. All active live chats for the selected brand will load in the content pane. Agents can also expand the brand and select the type of live chats they want to view (options include active and inactive chats). Expanding the brand also allows agents to view chats by department or group. Note: Agents can only view the live chats for which they are responsible. Managers can only view the live chats for the groups/departments in which they belong.

Viewing Live Chats By Agent

To view live chats by agent, click the live chat icon , expand By Agent and click the appropriate agent in the navigation pane. All active chats for the selected agent will load in the content pane.

Administrators can also expand the agent and select the type of live chats they want to view (options include active and inactive chats). Note: The ability to view live chats by agent is only available to managers using installations with less than 500 agents. In addition, managers can only view the live chats for the groups/departments in which they belong.

Transferring Live Chats

On occasion, an agent may need to transfer a live chat to another agent or group. There are various reasons why a chat may be transferred. For example, a level 1 tech support agent may need to escalate the chat to a more experienced level 2 agent for resolution. As another example, an incorrectly categorized live chat, such as a support chat that was incorrectly submitted as a sales chat, may need to be rerouted to the correct department. Note: The ability to transfer live chats is determined by the role permissions. By default, agents can transfer live chats. For more information, see Roles .

To transfer a live chat, select the live chat and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the live chat in the preview pane. This will open a pop-up window with the following fields:

- New Brand - The primary brand the chat should be transferred to.
- New Group - Select the group to which the chat should transfer from the list.
- New Agent - Select the agent to which the chat should transfer from the list. If the chat does not need to transfer to a specific agent, choose the auto-assign option and the chat will be assigned to an agent within the specified group based on the distribution method set by the administrator.
- Transfer Comment - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the live chat was transferred.

Click OK to transfer the live chat. Note: When a live chat is transferred, idle time is not reset for the new agent.

Live Chats in Queue

On occasion, live Chats are directed to the queue instead of an agent. Generally, there are three reasons why this occurs:

- In order for a live chat to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive chats for the corresponding group. If all agents either are logged out or are not receiving chats, the chat will be directed to the queue. Note: If all agents stop receiving chats at logout, the live chat icon on your site will indicate that chat is unavailable. This will prevent chats from filling the queue during non-business hours.
- Administrators have the ability to set live chat limits for agents. If that limit is reached, new live chats will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the administrator may set SmarterTrack to limit agents to five active chats. Once an agent's active chats load falls below five, the system will assign additional live chats based on the chosen distribution method.
- If a group is set with the Cherry Picking from Queue live chat distribution method, chats will sit in the queue until selected by an agent versus being automatically assigned to an agent.

For information about how SmarterTicket assigns live chats from the queue, see [Live Chat Distribution Methods](#) .

Deleting Live Chats

On occasion, an agent or administrator may need to delete a live chat from the system.

To delete a live chat, simply select the desired live chat(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an inactive chat they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a chat they are presented with a confirmation dialog. Once a live chat is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Live Chats

As time passes, finding a specific live chat can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find chats quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search within the area of the live chat section you are viewing (i.e. active, inactive etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a live chat. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all live chats EXCEPT deleted ones or to only search in deleted items.
- Chat Number - To search by chat number, enter the chat number in this field.
- Search String - Type the specific keywords to be queried. All sections of the chats will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Customer Name - To search by customer, enter the customer's name in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by chat status, select the appropriate status from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the

appropriate item from the list.

- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Instant Messenger Overview

SmarterTrack's instant messaging (IM) feature is different from live chat as instant messaging is internal to your help desk and promotes collaboration by allowing an agent to seek guidance from another, more experienced agent. This feature is useful when an agent needs clarification or help resolving a customer issue, but does not need to transfer a chat or ticket to another agent or supervisor.

Navigating Your Instant Messages

Agents and administrators can access the instant messenger by clicking the live chat icon and then clicking Instant Messenger in the navigation pane. A list of active IMs will load in the content pane.

In general, the following columns are available to the agent:

- Checkbox - Use these boxes to select multiple IMs. Instant messages must be selected before choosing an action from the toolbar.
- Name - The name of the chat communication type.
- Status - The status of the instant message.
- Started By - The agent that initiated the instant message.
- Participants - The number of agents currently participating in the IM.
- Date created - The date and time the IM was initiated.

Performing Instant Message Actions

In general, the following actions are available from the content pane toolbar:

- New - Starts a new IM.
- Actions - Click this button and select the appropriate option.
- Select All - Selects all chats in the content pane.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about an IM in the content pane.

- Visible Fields - Choose which columns are displayed in the navigation pane.
- Join - Allows the agent to join an IM already in progress.
- Transcript - Allows the agent to view a transcript of the instant messenger conversation.

Viewing Instant Messenger Conversations

To view an IM, simply click a IM and it will display in the preview pane. If you would rather view the IM in a popup window, click the View button instead. Note: Double-clicking an active IM will add the agent as a participant.

In general, the following options are available in the preview toolbar:

- Join - Allows the agent to join an IM already in progress. (This button only displays when viewing active IMs.)
- Transcript - Opens a text transcript of the entire IM conversation in a popup window.

Tabs within the Instant Messenger Conversation

IM information is organized within the following tabs:

- Conversation - This tab displays the last 100 messages in the IM.
- Active Agents - This tab displays information about the agents participating in the IM.
- Online Agents - This tab displays information about agents that are logged into the SmarterTrack system and able to receive an invitation to participate in the IM already in progress.

Note: Inactive IMs display the conversation tab only.

Viewing IMs by Status

Generally, IMs are organized into different sections depending on whether they are active or inactive.

To view IM conversations by status, click the live chat icon , expand Instant Messenger in the navigation pane and select the desired status. All IM conversations with the selected status will load in the content pane.

Viewing IMs by Agent

To view IMs by agent, click the live chat icon , expand Instant Messenger in the navigation pane and select the desired agent. All IM conversations for the selected agent will load in the content pane.

Note: The ability to view IMs by agent is only available on installations with less than 500 agents.

Viewing Deleted IMs

To view deleted IMs, click the live chat icon , expand Instant Messenger and click Deleted Items in the navigation pane. All deleted IMs will load in the content pane. For more information on deleted IMs, see [Deleting Instant Messenger Conversations](#) .

Joining Instant Messenger Conversations

Agents can create a new instant message conversation by clicking the new item icon and then clicking Instant Message . They can also go to the Instant Messenger area of the tree view, click on Active Chats and then click on the Newt button in the content pane. Regardless of how the instant message is started a new IM window with the following fields will open:

- Agent - Select an agent to IM from the list.
- Message - The text of the initial message you want to send.

To start the IM, type a message in the Message area and click Send . The agent you're starting the IM with will have a pop-up window appear with your name and message.

Agents can also join any active IM to which they have been invited, even if they previously ignored or rejected the IM. To join an IM already in progress, select the IM and click the Join button in the content pane toolbar or preview pane toolbar. This will open the IM in a pop-up window.

Deleting Instant Messenger Conversations

On occasion, an agent or administrator may need to delete an instant messenger conversation from the system. Note: Only inactive IMs can be deleted.

To delete a IM conversation, simply select the desired IM conversation(s) in the content pane. Then click Delete in the content pane toolbar.

When a IM conversation is deleted, it will be moved to the Deleted Items area of the Instant Messenger section. To view deleted chats, click Deleted Items in the navigation pane. A list of deleted IM conversations will load in the content pane. For information on any of the available options, see [Instant Messenger Overview](#) .

Undeleting Instant Messenger Conversations

Didn't mean to delete a IM conversation? Agents can retrieve deleted IM conversations from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired IM conversation(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your administrator can permanently remove the IM conversations in Deleted Items at

any time without warning, so don't delete chats if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted IM conversations.

Chat Rooms

While temporary agent conversations are hosted via instant messenger, some companies may want to conduct virtual meetings with employees. In this case, the administrator may create permanent chat rooms to host agent conversations. Chat rooms allow multiple different agents to join in group-level, department-level or even company-level conversations versus the one-on-one type of conversation handled via instant messenger.

To view a list of permanent chat rooms, click the live chat icon . Then expand Chat Rooms in the navigation pane and select the type of chat room that you want to view (options include active and inactive chat rooms). Note: Administrators may need to access the chat rooms by clicking the settings icon , then expanding the System Settings and Live Chat folders in the navigation pane and clicking Chat Rooms .

Chat rooms function identically to instant messages. For more information, see Instant Messenger Overview .

Active and Inactive Chat Rooms

To view an active or inactive chat room, expand Chat Rooms button in the navigation pane, then click Active to view active chat rooms or click Inactive in to inactive chat rooms. Depending on which item is selected, a listing of all active or inactive chat rooms for which the agent has access will load in the content pane.

The following options are available from the content toolbar:

- Join - Allows the agent to join the chat room.
- Search - Allows the agent to search for a chat room.
- Refresh - Depending on the system settings, the Workspace may or may not automatically refresh itself at regular intervals. Clicking this button will force the Workspace to refresh.

By Chat Room

Agents can join a specific chat room by expanding By Chat Room in the left tree view and selecting the appropriate chat room.

Call Logs

Call Logs Overview

SmarterTrack's call logging feature provides agents with the ability to track customer service and sales calls. By requiring agents to track their phone conversations, companies can help to eliminate calls from falling through the cracks and reduce the number of unresolved customer issues. In addition, managers can use call logs and their associated reports to determine the number of calls answered or placed per agent or group over a period of time, to determine how much of an agent's workload is dedicated to calls, or to identify common phone complaints and their resolutions.

To access your call logs, click the call logs icon . Depending on the role you are assigned, My Call Logs or Global Call Logs will load.

For help understanding the different areas of the call logs section, see the call logs diagram .

Navigating SmarterTrack's Call Logs Interface

My Call Logs vs. Global Call Logs

The My Call Logs section organizes all of the call logs for which an agent is responsible. When an agent accesses My Call Logs by clicking on it in the navigation pane, all active call logs for the agent will load in the content pane. My Call Logs also gives agents the ability to see any inactive logs that they have previously had with end users.

In addition, the My Call Logs section organizes logs by group. That means that every group the agent is active in will be listed and the agent can drill down into each group to see their active and inactive call logs.

Administrators and managers who are members of multiple groups may want to view active and/or inactive call logs for those groups those groups to better evaluate the actual needs of the organization or to gain valuable insight into company operations. To view all call logs in SmarterTrack, an agent, manager or administrator **MUST** be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see call logs for those groups. Once this is done, they simply click Global Call Logs in the navigation pane.

Regardless of whether you're accessing My Call Logs or Global Call Logs, all active and inactive logs in the system will load in the content pane when you open the respective call log section. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- **Checkbox** - Use these boxes to select multiple call logs. Call logs must be selected before choosing an action from any toolbar.
- **Subject** - An agent-generated phrase that usually describes the call log. Very long subject phrases are truncated.
- **Phone** - The phone number of the caller.
- **Group** - The group that is assigned to this call log.
- **Start Date** - The date and time the call started.
- **End Date** - The date and time the call ended.
- **Duration** - The length of the call.
- **Agent** - The agent who handled the call.

Performing Call Log Actions

In general, the following options are available from the content pane toolbar:

- **New** - Creates a new call log.
- **Actions** - Click this button and select the appropriate option to transfer a call log or select all call logs.
- **Select All** - Selects all call logs.
- **Transfer** - Transfer the selected call log(s) to another group or agent. For more information, see [Transferring Call Logs](#) .
- **View** - Click this button and select the appropriate option to choose the details that are displayed about a call log in the content pane.
- **Visible Fields** - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
- **Delete** - Deletes the selected call log(s). For more information on deleted call logs, see [Deleting Call Logs](#) .

Creating New Call Log

To create a new call log, click the new item icon and then click **Call Log** . Alternatively, an agent can click on the **New** button in the call log content pane. Regardless of the method used, a new call log window will open that the agent will use. Note: For companies using SmarterTrack Communicator, call logs can be configured to start automatically when a call comes in. In addition, if companies have

integrated SmarterTrack with their existing VoIP system, call logs can be configured to begin automatically using the extensive web services.

The new call log window contains all of the call log information (custom fields, related items, and resources), plus the compose tab, which the agent will use to create the call log.

The following fields will appear in the header of the call log. Note: When automating a call log, some of these fields may be auto-populated based on the fields available from the phone server. Customers using SmarterTrack Communicator will have phone number, start and end times, subject and a recording of the call added to each call log automatically.

- Brand - The primary brand the call log should be created for.
- Group - The Group to assign the call log to, then the agent that is creating the log for the appropriate group. While a Group is required, it is possible for the ticket to be auto-assigned to an agent using whatever distribution method is in place for the Group.
- Incoming Call - Check this box to indicate that the call was an incoming call.
- Subject - The title of the call log.
- Email - The email address of the customer.
- Phone - The phone number of the customer.
- Name - The name of the customer.
- Duration - The date and time the call started and ended.
- Call Details - The details and notes for a call log can be entered in the text box. These notes can in plain text or agents can use the text editor to stylize text, add links to websites, highlight important details and more.

The following options are available in the toolbar of the new call log window:

- Save - Saves the contents of the call log.
- Add - Allows the agent to attach an attachment, a new task, time log, ticket or related item to the call log. For more information on these options, see [Viewing Call Logs](#) .
- Actions - If there are any manual events created for new ticket creation, they will appear at the bottom of the Actions menu.
- Assistance - Allows the agent to find any knowledge base articles that can be of assistance with the call.
- Delete - Deletes the call log. For more information, see [Deleting Call Logs](#) .
- Print - Allows the agent to print the call log and its details.

Viewing Call Logs

To view a call log, simply click a call log and it will display in the preview pane. If you would rather view the call log in a popup window, double-click the call log instead.

In general, the following options are available from the preview pane toolbar:

- **Edit** - Allows the agent to modify the selected call log.
- **Transfer** - Transfers the call log to a new brand, group and/or agent. When clicking the Transfer button, you are presented with the following options:
 - **New Brand** - The brand you are going to transfer the log to.
 - **New Group** - The new group you are going to transfer the log to.
 - **New Agent** - The new agent you are going to transfer the log to.
- **Add** - Agents can add other items to each call log. This helps in keeping all communication in a single location and neatly organized. It should be noted that adding something like a task or ticket to a call log does NOT change the status of either item. Click this button and select the appropriate option to add a new task or time log to the call log or to add an existing item to the call log.
- **Attachment** - Adds an attachment from your local machine to the call log. When an agent adds an attachment to a call log, this information is stored in the Attachments tab.
- **Task** - Attaches a new task to the call log. When an agent adds a task to a call log, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- **Time Log** - Attaches a new time log to the call log. When an agent adds a time log to a call log, this information is stored in the Related Items tab.
- **Ticket** - Adding a ticket to a call log actually enables an agent to start a ticket for the customer based on their call. This is helpful for those issues where follow up is required for the customer or to transition customers from a phone call to a more cost-effective method of communicating.
- **Related Item** - Adds an existing ticket number to the call log. When an agent adds an existing item to a call log, this information is stored in the Related Items tab.
- **Actions** - If any manual events are created for call logs, they are displayed here and available for use.
- **Assistance** - Allows an agent to view relevant knowledge base articles based on the contents of the call log. These articles can then be used to help resolve customer issues.
- **Delete** - Deletes the call log. For more information on deleted call logs, see Deleting Call Logs

- **Print** - Allows the agent to print the information contained in the description and details tabs of the task. Note: If viewing the management interface from a mobile device, this option may not be available.

Tabs within a Call Log

Call log information is organized within the following tabs:

- **Description** - This tab includes any description or notes regarding the call. It also includes links to any files attached to the log.
- **Attachments** - This tab includes details about any files that are attached to the call, including who attached it, a link to the file, the file size and more.
- **Time Logs** - This tab includes any time logs attached to the call, including full details such as the time log category, duration and description.
- **Related Items** - This tab lists any related tickets that are attached to the current call log. Details include the ticket subject, a link to open the ticket in a new window, any attachments to the ticket and more.
- **Custom Fields** - This tab includes any custom fields the administrator created to help customize your company's call logs. This information can be populated by a user, an agent, or a third-party application (via the administrator).
- **History** - This tab displays information about the log, including when it was opened, the user who opened it and more.

In addition, agents can see how long they are working on the call by viewing the "Time on page" at the bottom of the call log window. This timer starts at 0h 0m 0s and continues counting until the agent navigates to another page. This is especially convenient for agents that need to complete time logs.

Transferring Call Logs

On occasion, an agent may need to transfer a call log to another agent or group. For example, if a call is transferred between agents, the log will also need to be transferred so the new agent can add notes and other information. Note: The ability to transfer call logs is determined by the role permissions. By default, agents can transfer call logs. For more information, see Roles .

To transfer a call log, select the call log and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the call log in the preview pane. This will open a popup window with the following fields:

- **New Group** - Select the group to which the call log should transfer from the list.
- **New Agent** - Select the agent to which the call log should transfer from the list.

Click OK to transfer the call log.

Deleting Call Logs

On occasion, an agent or administrator may need to delete a call log from the system. Note: The ability to delete a call log is determined by the role permissions. By default, agents cannot delete call log. For more information, see Roles .

To delete a call log, simply select the desired log(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a call log they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a call log they are presented with a confirmation dialog. Once a call log is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted call logs are automatically purged every 90 calendar days.

Once a call log is deleted, it can not be recovered. However, agents and managers can search any deleted items using the Advanced Search feature in SmarterTrack. For more information, see Searching Call Logs . Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Call Logs

As time passes, finding a specific call log can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find call logs quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the call log section you are viewing (i.e. all items, deleted items, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all call logs EXCEPT deleted ones or to only search in deleted call logs.
- Call Log Number - To search by call log number, type the call log number in this field.
- Search String - Type the specific keywords to be queried. The subject and description sections of call logs will be searched for these keywords.
- Subject - To search by subject, type the subject in this field.
- Phone Number - To search by phone number, type the phone number in this field.
- Email Address - To search by email, type the email address in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and due dates in these fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the date the task was last edited, enter the modified date in the fields or click the calendars and select the appropriate dates.
- Department - To search by department, select the appropriate department from the list.
- Agent - To search by agent, select the appropriate agent from the list.
- Sort Results - To specify the order in which results are displayed, select the appropriate option from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Tasks

Tasks Overview

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to add related tickets, live chats, and call logs to any task in the

system. This ability ensures agents can have all the information necessary to complete a task in one convenient location.

To access your tasks, click the tasks icon . Depending on the role you are assigned, My Tasks or Global Tasks (or both) will load.

For help understanding the different areas of the tasks section, see the tasks interface diagram .

Navigating SmarterTrack's Tasks Interface

My Tasks vs. Global Tasks

The My Tasks section displays tasks by their current status for a particular agent. Clicking on a status displays all of the tasks with that status in the content pane. Agents can click on a task and review its details in the preview pane or open a task in a new pop-up window by double clicking on it.

Based on their role permissions, administrators and managers have the ability to review all tasks in SmarterTrack, either by status or by agent. Clicking on Global Tasks in the navigation pane then clicking on a status displays all tasks with that status in the content pane, regardless of the agent it's assigned to. Expanding the By Agent tree menu displays all agents the administrator and/or manager has permission to view, and each agent has task status categories listed for review.

Regardless of whether you're accessing My Tasks or Global Tasks, all tasks in the system will load in the content pane when you open the respective task status. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- **Checkbox** - Use these boxes to select multiple tasks. Tasks must be selected before choosing an action from the toolbar.
- **Status** - Indicates the status and priority level of each task. (See below for Status definitions)
- **Subject** - An agent-generated phrase that usually describes the task. Very long subject phrases are truncated.
- **Owner** - Indicates the owner of the task, either a specific agent or a related item. (E.g., a ticket, live chat or call log)
- **Start Date** - The date and time the agent should begin the task.
- **Due Date** - The date and time the agent should complete the task by.
- **Completion Date** - The date the specific task was marked as completed.
- **Original Estimate** - The original estimated time for the task to be completed.
- **Remaining Estimate** - The estimated time remaining for the task to be completed.

Sorting

Clicking on any column header allows you to sort that column in either ascending or descending order. Final sort order uses the task's due date as the deciding factor. For example, 10 tasks with the same owner will sort from the closest due date to the furthest when sorting the Owner column in either ascending or descending order. In terms of the Status column, tasks sort from left to right, meaning they sort by status then the task's priority (or vice versa, depending on an ascending or descending sort order). Even in this scenario, however, due date is the last item used to determine the eventual sort order.

Performing Task Actions

In general, the following actions are available from the content pane toolbar:

- New - Creates a new task.
- Actions - Click this button and select the appropriate option to transfer tasks, select all tasks, or to change the status or priority of tasks.
- Select All - Selects all of the tasks in the content pane.
- Transfer - Transfers the selected task(s) to another group or agent. For more information, see Transferring Tasks .
- Status - To change the status of a task, select the appropriate option from the list.
- Under Consideration - This is a task that has not been finalized or that is still in discussion.
- Approved - This is a task that is finalized but has not been started yet. Therefore, it's been approved by management and is ready to be worked on. (I.e., moved into In Progress)
- In Progress - This task is actively being worked on by an agent.
- On Hold - This is a task that is active, but may require follow-up or further action before it can continue to be worked on or marked with another status.
- In Review - This task is inactive, but it needs to be reviewed by upper management or go through some other review process before it can be marked as Completed or put back to In Progress for further action.
- Completed - This is a task that was successfully completed and closed.
- Rejected - This is a task that was rejected by management.
- Priority - To change the priority level of a task, select the appropriate option from the list.
- Low - The selected tasks have a low priority and will be sorted toward the bottom of the lists.
- Normal - The selected tasks have a normal or unspecified priority level.
- High - The selected tasks are a high priority and will be sorted toward the top of the lists.
- Urgent - The selected tasks are very important and will show at the top of the lists.

- **View** - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.
- **Categories** - Allows you to see tasks for all master categories , tasks without a master category assigned or tasks for specific master categories.
- **Visible Fields** - Choose which columns are displayed in the navigation pane. It is also possible to modify default widths for each column to help them fit specific screen resolutions.
- **Delete** - Deletes the selected task(s). For more information, see [Deleting Tasks](#) .

Creating New Tasks

To create a new task, click the new item icon and then click **Task** . Alternatively, when in the **Tasks** section, you can click **New** in the preview pane toolbar. This will open a new task window that the agent will use to create the task.

The following fields will appear in the **Options** tab of the new task window:

- **Owned By** - New tasks can either be owned by an Agent, so that the task is created for, and assigned to, a specific agent, or owned by a related item. When a task is "owned by" a related item, the agent creating the task can attach the task to a specific ticket, live chat or call log.
- **Agent** - When a task is owned by an agent, the person creating the task can select a specific agent to assign the task to.
- **Related Item** - When a task is owned by a related item, use this field to add in the ticket, live chat or call log number the task is to be associated with.
- **Subject** - The title of the task.
- **Status** - Select the status of the task. Generally, an agent will want to mark a new task as **In Progress**. For more information on tasks status, see the [Tasks Overview](#) .
- **Priority** - Select the priority level of the task. By default, tasks are set to normal priority.
- **Start Date/Time** - The date and time the agent should start the task.
- **Due Date/Time** - The date and time the agent should have the task completed.
- **Original Estimate** - When a task is created, the agent can add an estimated time it will take to complete the task in minutes, hours, days or weeks.
- **Remaining Estimate** - Adjusting the remaining estimate gives managers a better understanding of how much time is still needed to complete the task.
- **Reminder** - Select when to receive a reminder about an upcoming task. For example, if the agent selects 10 minutes, a reminder will pop up 10 minutes before the task is due.
- **Reminder** - Agents have the ability to set a reminder when the task is coming due.

There are two other tabs available in the new task window:

- **Description** - Allows an agent to type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.
- **Categories** - Allows an agent to assign tasks to any master categories that are available.

The following options are available in the toolbar of the ticket response window:

- **Save** - Click to create the task.

Viewing Tasks

To view a task, simply click a task and it will display in the preview pane. If you would rather view the task in a popup window, double-click the task instead. Note: Double-clicking a task assigned to you also enables you to edit the task.

Generally, tasks are organized into different sections depending on whether they are under consideration, approved, in progress, on hold, in review, completed or rejected. To view tasks by status, expand Global Tasks (if you have the appropriate role permissions) or My Tasks in the navigation pane and select the desired status. All tasks with the selected status will load in the content pane. For more information on the options available when viewing a task, see Tasks Overview .

Transferring Tasks

On occasion, an agent may need to transfer a task to another agent or group. There are various reasons why a task may be transferred. For example, an agent that is leaving for vacation may need to transfer tasks to another agent to ensure they are completed while he is out of the office. As an another example, if an agent finds his workload is too heavy, he may transfer a task to another agent to rebalance his workload. Note: The ability to transfer tasks is determined by the role permissions. By default, agents can transfer tasks. For more information, see Roles .

To transfer a task, select the task and click the Actions menu in the content pane toolbar and click Transfer . This will open a pop-up window with the following fields:

- **New Agent** - Select the agent to which the task should transfer from the list.
- **New Status** - Select the status of the task. Generally, an agent will want to mark a transferred task as active.
- **New Priority** - Select the priority level of the task. By default, the priority level is normal.

Click OK to transfer the task.

Deleting Tasks

On occasion, an agent or administrator may need to delete a task from the system. Note: The ability to delete a task is determined by the role permissions. By default, agents cannot delete tasks. For more information, see Roles .

To delete a task, simply select the desired task(s) in the content pane. Then click the Delete menu in the content pane toolbar. Alternatively, agents can delete the task they are currently viewing by clicking the Delete menu in the preview pane toolbar. Regardless of the method used, when an agent deletes a task they are presented with a confirmation dialog. Once a task is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Tasks

As time passes, finding a specific task can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tasks quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the task section you are viewing (i.e. active, upcoming, closed, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search In - This dropdown allows you to select either all tasks EXCEPT deleted ones or to only search in deleted tasks.
- Search String - Type the specific keywords to be queried. The subject and description sections

of tasks will be searched for these keywords.

- **Related Item** - To search by related item, type the number of the associated live chat, ticket, or call log.
- **Agent** - To search by agent, select the appropriate agent from the list.
- **Priority** - To search by priority level, select the appropriate priority level from the list.
- **Status** - To search by task status, select the appropriate status from the list.
- **Categories** - To search by task category, select the appropriate category or group from the list.
- **Start Date** - To search by the date the task was started, enter the start date in the fields or click the calendars and select the appropriate dates.
- **Due Date** - To search by the date the task was due, enter the due date in the fields or click the calendars and select the appropriate dates.
- **Creation Date** - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- **Last Modified Date** - To search by the last modified date, enter the date in the fields or click the calendars and select the appropriate dates.
- **Sort Results** - To specify the order in which results are displayed, select the appropriate option from the list.
- **Max Results** - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Knowledge Base

Knowledge Base Overview

The knowledge base is a tool companies can use to share information with employees, customers and partners. In its simplest form, SmarterTrack's knowledge base is an online repository of articles that helps agents and customers solve issues quickly and efficiently. A well-organized knowledge base can save organizations money by decreasing the amount of employee time spent trying to find information about company products, policies, and/or procedures. As a customer service tool, a knowledge base can give customers easy access to information that would otherwise require a phone call, live chat or email ticket.

The navigation pane for the knowledge base is organized as follows:

- **My Articles** - Lists the articles that are assigned to a specific agent.
- **All Articles** - Managers and administrators will be able to see all articles in the knowledge base, regardless of their status or to whom they're assigned.

- Drafts - Lists all articles flagged as drafts.
- Review - Lists all articles flagged for review.
- Stale - Lists all articles that have reached their stale date. The timeframe for when articles become stale is set in System Settings. For more information, see Knowledge Base .
- By Folder - Lists all folders that were created for organizing articles.
- By Agent - Lists all agents who have articles assigned to them.
- Moderation - Lists moderation options for feedback and ratings.
- Broken Links - SmarterTrack scans articles for any broken internal or external links. This lists all articles that contain broken links.
- Advanced Search - Allows for a more advanced search of all knowledge base articles.

To access the knowledge base, click the knowledge base icon . By default, SmarterTrack will display knowledge base articles for all brands. However, agents can review articles for a specific brand by selecting it from the brands dropdown at the top of the tree menu.

For help understanding the different areas of the knowledge base section, see the knowledge base interface diagram .

Navigating the Knowledge Base

By default, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple articles. Articles must be selected before choosing an action from the toolbar.
- Article Title - The title of the article.
- Folder - The location of the article.
- Flags - Whether the article is flagged as draft, private or for review.
- Last Reviewed - The last date anyone reviewed the article in the management interface.
- Agent - The agent responsible for the article.
- Rating - The average rating portal visitors have given the article.

Performing Knowledge Base Actions

In general, the following options are available from the navigation pane toolbar:

- Actions - Folders can be created for products, issue types or any other way to keep your articles organized and easy to access, both for customers and for agents. Click this button and select the appropriate option to add, edit or delete folders to the knowledge base.
- Add Folder - Creates a new knowledge base folder.
- Edit Folder - Modifies an existing knowledge base folder.
- Delete Folder - Deletes an existing knowledge base folder and all of its contents.

In general, the following options are available from the content pane toolbar:

- New - Creates a new knowledge base article in the selected folder.
- Actions - Click this button and select the appropriate option to select all articles, move articles, copy articles or change the status of articles.
- Select All - Selects all knowledge base articles in the content pane.
- Mark - Click this button and select the appropriate option to change the status of the selected article(s).
- Public - Marks the article as public. Public articles are visible to everyone.
- Private - Marks the article as private. Private articles are only visible to administrators and agents and are great for internal guidelines, policies, troubleshooting steps or any other information needed by agents and managers.
- Draft - Marks the article as a draft. Drafts are only visible to administrators and agents. Draft articles are those that are essentially finished but are still awaiting review and/or revision prior to making them public or private.
- Reviewed - Marks the article as reviewed. Agents typically use this option to indicate that an article has been reviewed/modified after another agent has flagged it for review or the article has become stale. Note: By default, articles become stale every 90 days. This is to ensure content is reviewed for accuracy on a regular basis. This setting can be modified by administrators in the Knowledge Base Settings .
- Review - Flags the article for review. Agents typically flag an article for review when they want the article edited for content, clarity, or grammatical errors.
- Move - Moves the selected article(s) to another folder.
- Copy - Copies the selected article(s) to another folder.
- Transfer - Transfers responsibility for the article to a new agent.
- Rescan All for Broken Links - Initiates a scan of all articles for any broken URLs or links to external and/or internal content.
- View - Click this button and select the appropriate option.
- Visible Fields - Choose which columns are displayed in the navigation pane. It is also possible to modify default widths for each column to help them fit specific screen resolutions.
- Delete - Deletes the selected knowledge base articles. For more information, see Deleting Knowledge Base Articles .

Creating New Knowledge Base Articles

To create a new knowledge base article, click the new item icon and then click Knowledge Base Article . Alternatively, agents can go to the knowledge base content pane and click on the New button. Regardless of how you start a new article, a pop-up window will open that the agent will use to create the article.

The new article window contains a tab to compose the article, a tab to set article options such as brands the article applies to and any additional keywords, and a history tab that contains information on the article's creation date and any review or modification dates.

Compose Tab

This is where you actually create the article. The Compose tab includes a what-you-see-is-what-you-get (WYSIWYG) editor that will allow you to create stylish, HTML-formatted articles. This includes the ability to:

- Add links to internal and/or external Web pages
- Add images, sound or video using the File Manager
- Embed videos - either from your site or from sites like YouTube
- Stylize text and fonts, including bolding text, italicizing, etc.
- Create numbered and/or bulleted lists
- Highlight important sections with background colors
- Much more...

The following fields will appear on the Compose tab for any new article:

- Title - Type the title of the article in this field. This will also act as the link to the article, so a good idea is to use a keyword-rich title for your articles so that your article URLs are SEO-friendly.
- Folder - To specify the folder in which this article should appear, select the appropriate folder from the list.
- Assign To - To select an agent who will be responsible for the article, select the agent from the list.
- Summary - Type a brief summary of the article in this field. Note: There is a 256 character limit to article summaries.
- Flags - Flag the article as private, draft or for review. For more information, see Knowledge Base Overview
- WYSIWYG Editor - This is where the article is created.

Options Tab

The following options are available in the options tab of the new article window:

- Language - To specify the language, select the appropriate language from the list.
- Brands - To specify which brands the knowledge base article applies to, select the appropriate checkboxes.
- Keywords - Keywords are essential to help increase the accuracy of KB search results.

Therefore, the more keywords you add and the more specific your keywords are, the more specific your users can be when searching for articles and the more relevant their search results will be. Keywords are generally separate from what's included in article content. For example, you can specify plural versions of keywords, alternate spellings, brand names or even words that are synonymous with what you've included in your content. Note: Keywords do not have to be separated with any type of punctuation.

The following options are available in the toolbar of the new article window:

- Save - Saves the contents of the article.
- File Manager - Using the File Manager allows article creators to upload files, such as image files, for use within the articles they create.

Using the File Manager

The file manager is a great way for article creators to upload, store, organize and re-use various file types. Most often, these will be images for use in articles - screenshots, logos, diagrams and more. However, other files can be uploaded and re-used as needed.

Using the file manager is rather simple. When you click on the File Manager button in the new article compose window, a modal window will appear. The following options are available in the File Manager modal:

- Actions - Clicking the Actions button allows you to create folders for your uploads. Folder names should probably correspond to your KB article folders, but they can be any name you like that will help keep images organized. For example, create folders for images, for videos, for logos, etc.
- Insert - This allows you to insert a specific file into the article being created. To insert a file, simply go to the folder containing the image and a list of files will appear. Select the appropriate file and click the Insert button. When inserting a file, the following options are available:

- File - This is the file name of the file that was selected. Therefore, it's not editable.
- Type - This is the type of file being inserted. File types include: Link, which is a text link to an external or internal Web page or an entire website, or a link to a video hosted either locally or on a video service; Image, which can be an image type such as a PNG, a JPG, etc.; Media, which is generally for media types such as MP3 files.
- Link Text - Only available for Links. This is the text that will be used for the link within the article. Text links are generally fairly descriptive, describing the link type, location or what the user can expect when it's clicked on.
- Target - Only available for Links. This is how the link will open when it is clicked. The default Target is "_blank", which means a new window will open when the link is clicked.
- Tool Tip - Only available for Links. This is the text that appears when a user puts their mouse over the link text, without clicking the link. Generally, this is a simple description of where the link takes the person who clicks on it.
- Width - Only available for Images and Media. The width of the image, in pixels. While it is possible to modify this to change the width of the original image, doing so without adjusting the height of the image accordingly may distort the image as it appears in the article.
- Height - Only available for Images and Media. The height of the image, in pixels. While it is possible to modify this to change the height of the original image, doing so without adjusting the width of the image accordingly may distort the image as it appears in the article.
- Alt Text - Only available for Images. This is the text that appears when a user puts their mouse over the image. It is also used for accessibility features for the visually impaired. This text should be something short, like the title of the image.
- Description - Only available for Images. A brief description of the image: what it is, what it's for, etc.
- Upload - Allows you to upload a file. When you click upload, a file browser window will open that allows you to select the file to upload from your desktop or laptop or from any mapped drives.
- Delete - Use this to delete any files uploaded. Realize that any files deleted, but that are still used in existing articles, will no longer appear in those articles.
- Close - Closes the file manager modal window.

History Tab

The History tab shows agents the full history of the article, including the initial creation date, when an article was reviewed, when it was modified and more. The information available includes the name of the agent who performed the action so that any follow up can occur, as needed.

Viewing Knowledge Base Articles

To view a knowledge base article, simply click an article and it will display in the preview pane. If you would rather view the article in a popup window, double-click the article instead. Note: Double-clicking an article also enables you to edit the article.

In general, the following options are available from the preview pane toolbar:

- Edit - Edits the selected article.
- Transfer - Transfers the ticket to a new agent.
- Add - Click this button and select the appropriate option to add a comment or rating to an article.
- Actions - If any manual events are available or knowledge base articles, they will appear in this menu.
- View in Portal - Loads the selected knowledge base article in the portal. Viewing the article in the portal allows agents to see the layout of the article as portal visitors will see it.
- Delete - Deletes the selected article. For more information, see [Deleting Knowledge Base Articles](#).

Tabs within an Article

Article information is organized within the following tabs:

- Content - The text of the knowledge base article.
- Comments - The internal comments made on the knowledge base article.
- Feedback - The feedback left by readers of the article.
- Referrers - The list of sites that link to the article.
- Details - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.
- Translations - The linked translations of the article.

Viewing Articles by Status

Occasionally, agents and administrators may want to view all articles that are marked as drafts or that need reviewed. To view articles by status, click the knowledge base icon , expand By Status in the navigation pane and select the desired status. All articles with the selected status will load in the content pane.

Viewing Articles by Brand

To view articles by brand, click the knowledge base icon , expand By Brand in the navigation pane and select the desired brand. All articles assigned to the selected brand will load in the content pane.

Viewing Deleted Articles

Deleted articles can be found using Advanced Search . Here, you can search only deleted items based on a few key words and potentially find the deleted article.

Deleting Knowledge Base Articles

On occasion, an agent or administrator may need to delete a knowledge base article from the system.

Note: The ability to delete a knowledge base article is determined by the role permissions. By default, agents cannot delete knowledge base articles. For more information, see Roles .

To delete a knowledge base article, simply select the desired article(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an article they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a knowledge base article they are presented with a confirmation dialog. Once an article is deleted, it is no longer available for review or action and will eventually be purged from the system.

Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Articles

There are two methods an agent can use to search for an article: basic search or advanced search. Both KB search methods support using "+keyword" to only show articles containing that keyword or "-keyword" to exclude articles containing that keyword.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the knowledge base section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the knowledge base icon . Then click Advanced Search in the navigation pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by folder, select the appropriate folder from the list.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Flags - To search by article status (drafts, stale, private, etc.), select the appropriate status from the list.
- Creation Date - To search by article creation date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which articles were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Managing Knowledge Base Folders

Knowledge base articles are stored and organized using folders. For example, a financial institution using the knowledge base as a self-serve resource for customers may organize all of the articles related to savings accounts in one folder and articles related to checking accounts in another folder.

Creating Knowledge Base Folders

To add a new folder, click the Actions menu in the navigation pane toolbar and click Add Folder This will open a new folder window with the following fields:

- Folder - The name of the new folder.
- Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.
- Display folder in portal search menus - Check this box to allow portal visitors to choose this folder from the drop-down list when searching the knowledge base.
- Include articles in automatic searches - Enabling this means that any article added to this folder will be included in any automatic searches and article display prior to users submitting live chats or tickets using your portal.

Click Save .

Moving Knowledge Base Articles to Another Folder

Moving knowledge base articles between folders in SmarterTrack is easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a knowledge base folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

Moderating Knowledge Base Feedback

Knowledge base feedback can be a useful tool for companies that want to promote community on their portal and gather feedback on the content of an article. Article feedback can include helpful tips, questions about steps outlined in an article, suggestions for improving articles and more.

To eliminate spam comments, administrators may choose to moderate comments prior to publishing them. If this setting is enabled, agents and administrators can approve comments, review comments flagged as abusive and view blocked comments from within the knowledge base section of the management interface. Note: This setting can be enabled/disabled on the Knowledge Base page in system settings.

Moderating Feedback

When moderation of feedback is enabled and a portal visitor leaves feedback on an article, their feedback is not immediately visible to the public, it is only visible to the user who created it until a moderator approves it. To view unapproved feedback, click the knowledge base icon , expand Moderation in the navigation pane and click Feedback Moderation . On the Unapproved tab , a list of unapproved feedback will display in the content pane. The following options are available in the content pane toolbar:

- **Actions** - Click this button and select the appropriate option to select all, approve or block comments.
- **Select All** - Selects all feedback in the content pane.
- **Open** - Loads the knowledge base article in a popup window.
- **Approve** - Approves the selected feedback. Approving feedback makes it visible to the public.
- **Block** - Blocks the selected feedback. When feedback is blocked, it will not be visible to the public.
- **View** - Click this button and select the appropriate option to refresh the page or sort the order of items in the content pane.
- **Sort** - Choose in which order to sort items in the content pane. It is also possible to select the column to sort by.
- **Delete** - Permanently deletes the selected knowledge base comment(s).

To moderate specific user feedback, double-click on the desired item. The item will display in a pop-up window and the following options will be available in the preview pane toolbar:

- **Edit** - Modifies the feedback.
- **Open KB Article** - Loads the knowledge base article in a popup window.
- **Approve** - Approves the selected feedback. Approving feedback makes it visible to the public.
- **Block** - Blocks the selected feedback. When feedback is blocked, it will not be visible to the public. In addition, the portal visitor will be blacklisted from providing any future feedback on articles.
- **Delete** - Deletes the feedback.
- **Close** - Closes the feedback without performing any other action on it.

Reviewing Feedback Flagged as Abusive

When a portal visitor flags customer feedback as abusive, that feedback is no longer visible to the portal visitor. To view abusive feedback, click the knowledge base icon , expand Moderation in the navigation pane and click on the Abuse tab. A list of feedback flagged as abusive will display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve, edit or block customer feedback flagged as abusive.

Viewing Blocked Feedback

When a moderator blocks feedback, it is no longer visible to anyone in the portal. However, moderators can view any blocked feedback by clicking the knowledge base icon , expanding Moderation in the navigation pane and clicking on the Blocked tab. A list of blocked feedback will

display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve or edit feedback that is blocked.

Note: Moderators can sort blocked feedback to identify portal visitors that are continually posting offensive, spammy or off-topic feedback and use that information to block the offending IP address from providing feedback in the future.

Moderating Knowledge Base Ratings

Knowledge base article ratings can be a useful tool for companies that want to promote community on their portal and gather feedback on the usefulness of an article. Articles with higher ratings can be used to further educate customers and end users while articles with lower ratings can be reviewed and revised in order to make them more helpful.

Although rare, there is the possibility that a customer or competing company could try to manipulate the ratings of an article. To prevent this from happening, only logged in users can rate an article. In addition, moderators can exclude a certain user from being included in ratings calculations. Note: Excluded users do not know their ratings are not calculated, as SmarterTrack still allows them to submit ratings on articles.

To view a list of excluded users, click the knowledge base icon , expand Moderation in the navigation pane and click Rating Moderation . Then click on the Excluded tab in the content pane and a list of excluded users will display and the following options will be available:

- Actions - Click this button and select the appropriate option to select all users or include users in ratings.
- Select All - Selects all of the users in the content pane.
- Include - Marks the selected user(s) as included for ratings calculations.
- Exclude - Removes the ability of the user(s) to rate articles.

Similarly, moderators can view a list of the users whose ratings are included in average calculations by clicking the knowledge base icon , expanding Moderation in the navigation pane and clicking the Included tab.

For step-by-step instructions on how to include or exclude a user's ratings, please refer to the KB article [How To - Moderate Knowledge Base Article Ratings](#) .

Canned Replies

Canned Replies Overview

Canned replies are predefined responses to frequently asked questions that can be used to quickly and efficiently respond to some tickets and live chats. For example, if a company is experiencing some service interruption, a canned response can be created by management that discretely relays information about the outage, ETA for the service resuming, where to go for more information and more. This makes it easy for front line agents to quickly disseminate information to end users, especially at times when call, ticket and chat volumes can be higher than normal.

To access canned replies, click the canned replies icon . All of the canned replies in the root folder that are assigned to a department you belong to will load in the content pane.

For help understanding the different areas of the canned replies section, see the canned replies interface diagram .

Navigating Canned Replies

In general, the following columns are available in the content pane:

- **Checkbox** - Use these boxes to select multiple articles. Canned replies must be selected before choosing an action from the toolbar.
- **Title** - The title of the canned reply.
- **Folder** - The location of the canned reply.
- **Assigned To** - The agent or department to which the canned reply is assigned. This determines which agents or departments have access to the canned reply.
- **Flags** - Whether the canned reply is flagged or not.

Performing Canned Reply Actions

In general, the following options are available from the navigation pane toolbar:

- **Actions** - Click this button and select the appropriate option to add, edit or delete folders to the knowledge base.
- **Add Folder** - Creates a new canned replies folder.
- **Edit Folder** - Modifies an existing canned replies folder.
- **Delete Folder** - Deletes an existing canned replies folder, and any sub-folders or canned replies are moved up one level. Therefore, if you want to delete a folder and all of its contents, you will need to delete the contents of a folder first, then delete the folder.

In general the following options are available from the content pane toolbar:

- New - Creates a new canned reply in the selected folder.
- Actions - Click this button and select the appropriate option to select all canned replies, move canned replies, copy canned replies or change the status of canned replies.
- Select All - Selects all canned replies in the content pane.
- Mark - Click this button and select the appropriate option to change the status of the selected canned reply(s).
- Public - Marks the canned reply as public. Public canned replies are visible to administrators and agents.
- Draft - Marks the article as a draft. Drafts are only visible to administrators and agents.
- Move - Moves the selected canned reply(s) to another folder.
- Copy - Copies the selected canned reply(s) to another folder.
- View - Click this button and select the appropriate option.
- Visible Fields - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
- Delete - Deletes the selected knowledge base articles. For more information, see [Deleting Canned Replies](#).

Creating New Canned Replies

To create a new canned reply, click the new item icon and then click Canned Reply . Alternatively, agents can click New at the top of the content pane. Either action will open a new canned reply window that the agent will use to create the canned reply.

The new canned reply window contains a tab to compose the reply, a tab to set reply options such as the default language to use and whether the reply should be available for live chats and/or tickets, and a history tab that contains information on the article's creation date and any review or modification dates.

Compose Tab

This is where you actually create the canned reply. The Compose tab includes a what-you-see-is-what-you-get (WYSIWYG) editor that will allow you to create stylish, HTML-formatted replies. The following fields will appear on the Compose tab for any new article:

- Title - Type the title of the canned reply in this field.
- Folder - To specify the folder in which this canned reply should appear, select the appropriate folder from the list.
- Assign To - To specify the agent or department to which the canned reply should be assigned, select the appropriate option from the list.
- Flags - In order to flag the canned reply for review, check the appropriate box. For more information, see Canned Replies Overview
- WYSIWYG Editor - This is where the article is created.

To compose the canned reply, type the text of the reply in the large editing box below the canned reply header. Agents can change the formatting using the WYSIWYG editor.

Options Tab

The following options are available in the options tab of the new article window:

- Language - To specify the language, select the appropriate language from the list.
- Canned Reply Type - To specify whether the canned reply can be used for tickets and live chats, tickets only, or live chats only, select the appropriate option from the list.

The following options are available in the toolbar of the new article window:

- Save - Saves the contents of the canned reply.

History Tab

The History tab shows agents the full history of the reply, including the initial creation date, when an article was reviewed, when it was modified and more. The information available includes the name of the agent who performed the action so that any follow up can occur, as needed.

Viewing Canned Replies

To view a canned reply, simply click a canned reply and it will display in the preview pane. If you would rather view the canned reply in a popup window, double-click the canned reply instead. Note: Double-clicking a canned reply also enables you to edit the canned reply.

In general, the following options are available from the preview pane toolbar:

- Save - Edits the selected canned reply.
- Delete - Deletes the selected canned reply. For more information, see Deleting Canned Replies
- Cancel - Closes the canned reply without saving it.

Tabs within a Canned Reply

Canned reply information is organized within the following tabs:

- Content - The text of the knowledge base article.
- Options - This tab includes the language used for the reply as well as where the reply can be used within SmarterTrack.
- History - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.

Deleting Canned Replies

On occasion, an agent or administrator may need to delete a canned reply from the system. Note: The ability to delete a canned reply is determined by the role permissions. By default, agents can delete canned replies. For more information, see Roles .

To delete a canned reply, simply select the desired canned reply(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a canned reply they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a canned reply they are presented with a confirmation dialog. Once a canned reply is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Search for Canned Replies

There are two methods an agent can use to search for a news item: basic search or advanced search.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the canned replies section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the canned replies icon . Then click Advanced Search in the navigation pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by root folder, select the appropriate folder from the list.
- Assigned To - To search by the agent or department to which the canned reply is assigned, select the appropriate option from the list.
- Flags - To search by flag, select the appropriate status from the list.
- Creation Date - To search by the creation date of the canned reply, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which canned replies were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Managing Canned Reply Folders

Canned replies are stored and organized using folders. For example, a company may organize all of the canned replies related to billing in one folder and canned replies related to promotional offers in another folder.

Creating Canned Reply Folders

To add a new folder, click the Actions menu in the navigation pane toolbar and click Add Folder. This will open a new folder window with the following fields:

- Folder - The name of the new folder.
- Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.

Click Save .

Moving Canned Replies to Another Folder

Moving canned replies between folders in SmarterTrack is easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a canned replies folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

News

News Overview

The news section gives organizations the ability to post important notices to portal visitors, such as company news, current promotions and sales, or information on upcoming events. For example, a realty agency may use news items to highlight new or featured properties or an educational institution may use news items to give parents updates about school policies, parent/teacher conferences, holidays, and other important events.

To access news items, click the news icon . All of the news items in the system will load in the content pane.

For help understanding the different areas of the news section, see the news interface diagram .

Navigating News

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple articles. Articles must be selected before choosing an action from a toolbar.
- Title - The title of the news item.
- Flags - The status of the news item (private, public, draft, etc.).
- Date - The date and time the news item was created.

Performing News Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new news item.
- Actions - Click this button and select the appropriate option to select all news items change the status of news items.
- Select All - Selects all news items in the content pane.
- Mark - Click this button and select the appropriate option to change the status of the selected news item(s).
- Public - Marks the news item as public. Public news items are visible to everyone.
- Private - Marks the news item as private. Private news items are only visible to administrators and agents.
- Draft - Marks the news item as a draft. Drafts are only visible to administrators and agents.
- Reviewed - Marks the news item as reviewed. Agents typically use this option to indicate that a news item has been reviewed/modified after another agent has flagged it for review.
- Review - Flags the news item for review. Agents typically flag a news item for review when they want it edited for content, clarity, or grammatical errors.
- Rescan All for Broken Links - Scans all news items to check for broken internal and external links.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed in the content pane.
- Visible Fields - Choose which columns are displayed in the navigation pane. It is also possible to modify default widths for each column to help them fit specific screen resolutions.
- Delete - Deletes the selected news items. For more information, see [Deleting News Items](#) .

Creating News Items

To create a new news item article, click the new item icon and then click News Item You can also click on New in the content pane. Regardless of the method, a new news item window will open that the agent will use to create the article.

The new news item window contains tabs for options, broken links, translations, statistics and history, plus the compose tab, which the agent will use to write the article.

The following fields will appear in the header of the news item window:

- Title - Type the title of the news item in this field.
- Date - The date the news item was created.
- Summary - Type a brief summary of the news item in this field.

- **Flags** - To specify the status of the news item, select the appropriate checkbox(es). For more information, see [News Overview](#)

Type the text of the news item in the large editing box below the news item header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the options tab of the new article window:

- **Language** - To specify the language, select the appropriate language from the list.
- **Brands** - To specify which brands the news item applies to, select the appropriate checkboxes.

Just as with knowledge base articles, SmarterTrack scans news items for any broken internal or external links. The broken links tab lists all broken links in the news item.

The translations tab allows new or existing news items to be linked or unlinked to translations.

The statistics tab displays the number of unique views and hits a news item receives. These statistics can be useful for determining the effectiveness and reach of news items. If news items don't appear to receive many views it may be an indication that more attention needs to be paid to the news features or to the portal itself to ensure customers and end users know about them.

The history tab displays information such as the initial article creation date, the agent who created the article, any changes or modifications to the article and more.

The following options are available in the toolbar of the news item window:

- **Save** - Saves the contents of the news item.
- **File Manager** - Allows files, images, movies and sounds, to be added to news items.
- **Cancel** - Cancels the news item creation without performing any other action.

Viewing News Items

To view a news item, simply click a news item and it will display in the preview pane. If you would rather view the news item in a popup window, double-click the news item instead. Note: Double-clicking a news item also enables you to edit the news item.

The new news item window contains a tab to compose the reply, a tab to set options such as the default language to use and the brand the news item should display for, a broken links tab that will display any broken links in the news item, a translations tab that can be used to link the news item to the same item in a different language, a statistics tab and a history tab.

In general, the following options are available from the preview pane toolbar:

- Edit - Edits the selected news item.
- View in Portal - Loads the selected news item in the portal. Viewing the news item in the portal allows agents to see the layout of the news item as portal visitors will see it.
- Delete - Deletes the selected news item. For more information, see [Deleting News Items](#).

Tabs within a News Item

News item information is organized within the following tabs:

- Compose - The text of the news item. Agents and managers can edit news items from this tab.
- Options - This tab highlights the default language for the news item as well as the brand portal where the news item should appear.
- Broken Links - SmarterTrack scans articles for any broken internal or external links. This lists all articles that contain broken links. These should be fixed prior to the news item going live.
- Translations - If there is a complementary news item that was translated to a different language, it will be displayed on this tab.
- Statistics - Displays the number of unique views and hits a news item receives.
- History - Information about the news item, including its creation date, any modification dates and more.

Viewing News Items by Flag

Occasionally, agents and administrators may want to view all news items that are marked as drafts or that need reviewed. To view news items by status, click the news icon, expand By Flag in the navigation pane and select the desired status. All news items with the selected status will load in the content pane.

Viewing News Items by Broken Links

Occasionally, agents and administrators may want to view all news items that contain broken internal or external links. To view news items that contain broken links, click the news icon and click Broken Links in the navigation pane. All news items with the selected status will load in the content pane.

Deleting News Items

On occasion, an agent or administrator may need to delete a news item from the system. Note: The ability to delete a news item is determined by the role permissions. By default, agents can delete news items. For more information, see [Roles](#).

To delete a news item, simply select the desired news item(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete a news item they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a

news item they are presented with a confirmation dialog. Once a news item is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching News Items

There are two methods an agent can use to search for a specific news item: basic search or advanced search.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the news section you are viewing (i.e. a specific brand, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the news icon . Then click Advanced Search in the navigation pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Flags - To search by flag (drafts, flagged, etc.), select the appropriate flag from the list.
- Date Range - To search by a date range during which news was published, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Who's On

Who's On Overview

SmarterTrack's Who's On feature gives agents the ability to see who is browsing the company portal and/or website. In addition, Who's On provides information about visitors that can be used to expedite customer service, identify trends, and create targeted sales and marketing campaigns.

For help understanding the different areas of the Who's On section, see the Who's On diagram .

Navigating Who's On

The Who's On section provides information about current website and/or portal visitors. When an agent accesses Who's On by clicking the Who's On icon and then clicking the appropriate brand, all visitors currently browsing your website will load in the content pane.

In general, the following columns are always available to the agent:

- **Checkbox** - Use these boxes to select multiple Wwbsite or portal visitors. Visitors must be selected before choosing an action from the toolbar.
- **Status** - Indicates whether the visitor is being tracked by Who's On.
 - If the status is active, Who's On is tracking the visitor.
 - If the status is pending, Who's On will resume tracking the visitor once the visitor navigates to another page of your website or portal.
 - If the status indicator is removed, Who's On is not tracking the visitor.
- **Started** - The date and time the session was initiated.
- **Duration** - The amount of time the visitor has been on your website or portal.
- **Idle** - The amount of time that passed since a visitor has navigated to a page within your website or portal.
- **City, Region, Country** - The customer's geographic information. Note: Geographic information is not always available.

In addition, the following columns can be added or removed by the agent at any time:

- **IP Address** - The customer's IP address.
- **Host Name** - The unique name by which the visitor's networked-attached device (computer, cell phone, etc.) is known on a network.
- **Host Domain** - The name of the server on which the visitor's network is hosted.
- **Hits** - The number of times a visitor hits any page of your Web site or portal. Note: Only pages that are configured for Who's On tracking will be included in this figure.

- Language - The primary language of the customer as indicated from the customer's Web browser.
- Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.
- OS - The operating system of the customer's computer. Note: OS information is not always available.
- Chat Status - The current chat status of the customer.
- Sent - A chat invitation is pending.
- Active - The customer is participating in a live chat.
- Rejected - The customer rejected the chat invitation or closed the chat window.
- Ignored - The customer ignored the chat invitation or navigated to a different page.
- Initial Page - The URL of the first page of your Web site or portal that the visitor viewed.
- Initial Virtual Page - The first page of your Web site or portal that the visitor viewed as defined by the tracking script set by the administrator. Virtual pages can be used to summarize the contents of the initial page. For example, if the initial page URL is lengthy, the administrator may want to create a virtual page with a shorter identifier.
- Initial Page Title - The title of the initial page.
- Initial Referrer - The URL of the Web page the visitor navigated from to reach your Web site or portal.
- Current Page - The current page URL the visitor is browsing.
- Current Page Title - The title of the current page the visitor is browsing.
- Current Referrer - The URL of the Web page the visitor last navigated from.
- Chat Invites Sent - The number of live chat invites the visitor has received.
- Chat Invites Rejected - The number of live chat invites the visitor has rejected.
- Chat Invites Accepted - The number of live chat invites the visitor has accepted.
- Chat Invites Ignored - The number of live chat invites the visitor has ignored.
- Chats Forced - The number of forced live chats with the visitor.
- Invitation Last Sent Date - The date and time the customer last received a live chat invitation.
- Last Chat Date - The date and time the customer last participated in a live chat.
- First Chat Date - The date and time the customer first participated in a live chat.
- Last Agent to Chat - The agent that last corresponded with the customer via live chat.
- Last Department to Chat - The department that last corresponded with the customer via live chat. Note: The information provided in each column pertains to the current session only.

Performing Who's On Actions

In general, the following options are available from the navigation pane toolbar:

- **New** - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.

In general, the following options are available from the content pane toolbar:

- **Actions** - Click this button and select the appropriate option to select all visitors or remove a visitor from Who's On.
- **Select All** - Selects all of the visitors listed in the content pane.
- **Invite to Live Chat** - Selecting this option will send a live chat invitation to the visitor.
- **Force to Live Chat** - Selecting this option will open a live chat with the visitor. Note: This option bypasses the invitation stage of the chat process—it does not force the visitor to participate in the chat. The visitor may close the chat box without responding.
- **View** - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.
- **Refresh** - Refreshes the page.
- **Sort** - Choose in which order to sort items in the content pane.
- **Visible Fields** - Choose which columns are displayed in the navigation pane.

Viewing a Visitor's Who's On Summary

To view additional information about a visitor, simply click a visitor and the visitor's Who's On summary will load in the preview pane. Note: The information provided in the Who's On summary pertains to the current session only.

In general, the following options are available from the preview pane toolbar:

- **Print** - Prints the information contained in the Who's On summary. Note: If viewing the management interface from a mobile device, this option may not be available.

Tabs within the Who's On Summary

Who's On summary details are organized within the following tabs:

- **Visitor** - This tab includes basic information about the session, including the start time, duration and idle time. This tab also includes information about the visitor, including browser type, operating system, geographic details, the host name, and the host domain.
- **Page History** - This tab displays the website and portal pages the visitor viewed in chronological order. This tab also includes the time the visitor viewed each page, the length of time the visitor viewed each page, and the number of hits for that page.
- **Page Summary** - This tab organizes the pages the visitor viewed by the number of times the

visitor hit each page. This tab also includes information about the initial page title, the initial referrer, the current referrer, and the total amount of time the visitor spent on each website or portal page.

- **Invitation History** - This tab displays information about the visitor's live chat activity in chronological order. Note: If the visitor has not participated in any live chats and has not received any live chat invitations, there will be no content in this tab.
- **Invitation Summary** - This tab displays information about the visitor's chat activity, including the number of live chat invitations the visitor accepted, rejected, and ignored; the total number of live chat invitations the visitor received; the date and time of the last live chat the visitor participated in; and the last agent to chat with the visitor.
- **Custom Variables** - This tab displays any custom variables the administrator created. Map - This tab displays the geographic location of the customer. Note: Agents can initiate a live chat from the map by clicking on a pin and clicking Invite to Chat . --%>

Chatting with Visitors

On occasion, an agent may want to chat with a website or portal visitor. There are various reasons why initiating a chat with a visitor might be beneficial. For example, an agent evaluation the Who's On summary may notice that the pages viewed by the visitor indicate an interest in a specific product or service the company offers. By inviting the customer to chat, the agent has the opportunity to answer questions in real time and can even push additional resources to the customer. When used in conjunction with live chat, Who's On can help increase conversions and expedite customer service.

To initiate a live chat with a customer, select the customer. Then click the Actions menu and select the appropriate option:

- **Invite to Live Chat** - Sends a live chat invitation to the visitor.
- **Force to Live Chat** - Opens a live chat with the visitor. Note: This option bypasses the invitation stage of the chat process--it does not force the visitor to participate in the chat. The visitor may close the chat box without responding.

Agents can also initiate a live chat from the density map by clicking on a pin and clicking Invite to Live Chat .

For more information about live chat, see Live Chats Overview .

Pushing Additional Resources to Visitors

On occasion, an agent may want to provide a visitor with additional resources, such as a Web page or KB article. For example, a realty agency may use this feature to provide additional property

information or alternative properties to site visitors as they browse. For information about how to push pages, see Viewing Live Chats .

Reports

Reports Overview

The practice of routinely generating and evaluating reports provides the business intelligence companies need to uncover problems, establish policies, and accurately measure results. SmarterTrack helps managers spot trends and improve employee performance with powerful reports that can be emailed on a regularly scheduled basis to a targeted audience.

Report Options

Each report has a number of options that are available to help further customize the data that is returned in a report as well as modify how that report data is presented. In general, the following options are available at the top of the content pane for each report:

- **Generate Report** - Re-runs any report using the configured options.
- **Email** - Allows an agent to send a specific report to a number of recipients.
- **Export** - Allows an agent to export the data contained in a report in either tab delimited or comma separated value (CSV) format.
- **Set Dates** - Allows an agent to utilizes a pre-selected set of dates for a report. By default, the last 7 days is used for all reports when they initially load.
- **Print** - Allows an agent to print out a report.

The following options allow an agent to modify how data is presented in each report.

- **Date Range** - Allows an agent to select a custom date range for each report.
- **Chart** - Allows an agent to select the type of chart that represents the data presented.
- **Sort** - Changes the sort order of the data presented and presents which column to use for the sort.
- **Group By** - Selects how the data is grouped together in the report. Examples include by hour, by week or by day.
- **Filter** - Filters can be applied to help narrow down how data is presented in a report. For example, for trend reports agents can filter data based on department, group or agent. Summary reports can filtered at an even more granular level.

Custom Reports

Report items can be grouped and filtered to create custom reports. With summary, trend, and custom reporting, SmarterTrack provides managers with the information they need to make educated business decisions. Note: Report availability may vary by role and/or permissions.

Summary and Trend Reports

SmarterTrack includes more than 70 predefined summary and trend reports:

- Summary reports can be used to evaluate performance of individual products, departments, or agents over days, weeks, or months. Summary report data is most often represented using a bar graph. For example, a manager would use a summary report to determine which agent had the heaviest ticket workload during a particular month.
- Trend reports can be used to detect performance trends over time. Trend report data is most often represented using a line graph. For example, a support manager would use a summary report to determine which business days yielded the most support requests during the first quarter.

Survey Results

Once a survey is made available, managers, administrators and agents are able to view the results of the surveys once end users start filling them out. Results are grouped by brand, by survey or by agent. Clicking on each will display any options available.

Summary Reports

Audit Reports

To access audit reports, click the reports icon . Then expand the Summary Reports and Audit Reports folders. The following audit reports are available:

- Abandoned Chats - Shows details about live chats that were started but an agent failed to respond. Abandoned chats are closed by the end user without any interaction from an agent.
- Agent-Group Activity - Shows up-to-date information on every agent's activity level by their group and by function. For example, when agents initially log in to tickets and/or live chats, when they go unavailable, when they log out and more. As the information is updated essentially "on the fly", using this report and continually generating it is a good way to stay on top of what agents are doing, when they're going away from their keyboards and more.
- Agent Web Sessions - Shows the Web sessions for a single agent or multiple agents during a set time period. This report is useful for monitoring the activity of staff. Note: Sessions within

three minutes of one another are joined and considered the same session for reporting purposes.

- **Call Time Logs** - When time logs are added to call logs, this report shows the amount of time agents spent working with customers via phone calls. Note: Only calls with time logs are included in this report.
- **Chat Time Logs** - When time logs are added to live chats, this report shows the amount of time agents spent working with customers via live chat. Note: Only chats with time logs are included in this report.
- **Coverage Time** - Shows the number of hours and minutes that are covered by at least one active agent for each department or group during a set time period. Chat and ticket coverage are reported separately because agents can become active in those areas separately. This report can be grouped by employee as well, for greater detail.
- **Deletions** - Shows the number of deleted tickets and/or live chats currently in the system. Deleted items can be accessed via Advanced Search for both tickets and chats. Note: Purged items are not included in this report. SmarterTrack automatically purges deleted items after 30 days.
- **Ticket Time Logs** - When time logs are added to tickets, this report shows the amount of time agents spent working with customers via tickets. Note: Only tickets with time logs are included in this report.
- **Transfers** - Shows details about tickets and/or live chats that were transferred in to, or out of, various departments/groups. It is also possible to group this report by Employee, so managers can see which agents are transferring the most tickets.

Depending on the report selected, the following report items are available:

- **Agent** - The specific agent.
- **Billable** - Indicates whether the time log hours (for tickets, chats or calls) are considered billable hours.
- **Category** - The master category that the time log is assigned to.
- **Live Chat Coverage Percent** - The percentage of business hours that a department's live chat is covered by at least one active agent.
- **Live Chat Coverage Time** - The total amount of time live chats are available.
- **Department** - The specific department.
- **Date** - The time frame during which the event occurs.
- **Elapsed Time** - The total amount of time the agent was logged into SmarterTrack.
- **Email Address** - The customer's email address.
- **Group** - The specific group.
- **Incoming Chat Transfers** - The total number of live chats transferred to a specific department from another department.

- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Name - The customer's name.
- Outgoing Chat Transfers - The total number of live chats transferred from a specific department to another department.
- Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
- Subject - The title of the time log.
- Ticket Coverage Percent - The percentage of business hours that a department has at least one active agent available to receive tickets.
- Ticket Coverage Time - The total amount of time that a department has at least one active agent available to receive tickets.
- Time In - The time the agent logged into SmarterTrack.
- Time Out - The time the agent logged out of SmarterTrack. Note: If the agent is logged in when the report is created, the time out will reflect the current time.
- Total Calls Deleted - The total number of deleted call logs currently in the system. Note: Purged call logs are not included in this report.
- Total Chats Deleted - The total number of deleted live chats currently in the system. Note: Purged live chats are not included in this report.
- Total Tickets Deleted - The total number of deleted tickets currently in the system. Note: Purged tickets are not included in this report.
- Wait Time - The amount of time that has elapsed since the agent last responded to the ticket or live chat.
- User - The specific agent.

Call Log Reports

To access call log reports, click the reports icon . Then expand the Summary Reports and Calls folders. The following cost reports are available:

- Calls Overview - Shows an overall view of the organization's call usage during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Average Session Length - The average length of the calls in minutes.
- Department - The specific department.

- Group - The specific group.
- Total Calls - The total number of calls that occurred during the time frame.
- Total Incoming Calls - The total number of incoming calls that occurred during the time frame.
- Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand the Summary Reports and Canned Replies folders. The following canned reply reports are available:

- Canned Reply Contribution - Shows the number of canned replies an agent has created, edited, review, flagged, deleted, or inserted into tickets during a set time period. This report is useful for identifying how much or how little an agent uses canned replies in ticket responses and summarizes each agent's contribution towards the contents of the canned reply system.
- Canned Reply Popularity - Shows the number of times a canned reply was used and the number of agents that used each canned reply during a set time period. This report is useful for detecting which canned replies are frequently used and which canned replies should be phased out.
- Canned Reply Created - Shows the number of canned replies created during a set period of time. This report is useful because it provides an audit trail of all canned replies created by agents during a time period.
- Canned Reply Modified - Shows the number of canned replies edited during a set period of time. This report is useful because it provides an audit trail of all canned replies edited by agents during a time period.
- Canned Reply Events - Shows the number of times canned replies were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the canned reply system during a time period.
- Flagged Canned Replies - Shows the number of canned replies currently flagged for review.
Note: This report is not date-specific and always shows the replies that are currently flagged.
- Stale Canned Replies - Shows the number of stale canned replies currently in the system.
Note: This report is not date-specific and always shows the replies that are currently stale.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Agents Using Reply - The number of agents that used a particular canned reply.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the canned reply.

- Replies Added - The number of canned replies added to the system.
- Replies Deleted - The number of canned replies deleted from the system.
- Replies Edited - The number of canned replies edited in the system.
- Replies Flagged - The number of canned replies flagged for review in the system.
- Replies Inserted into Tickets - The number of distinct canned replies inserted into ticket responses.
- Replies Reviewed - The number of distinct canned replies reviewed by agents.
- Subject - The name of the canned reply.

Cost Analysis Reports

To access cost analysis reports, click the reports icon . Then expand the Summary Reports and Cost Reports folders.

Cost reporting is a way to estimate the amount of money that tickets and chats are costing you on a group, department, or user level. They can also be used to track costs by custom field or by end user to identify problem areas. Costs are estimated using a "per hour" amount assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available:

- Cost Summary - Shows an estimated cost of tickets and live chats by department, group, agent, or customer during a set time period. This report is useful because it allows managers to identify the most expensive areas of a company at a glance.
- Ticket Cost Breakdown - Shows a breakdown of ticket costs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
- Live Chat Cost Breakdown - Shows a breakdown of live chat by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
- Call Cost Breakdown - Shows a breakdown of call logs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Department - The specific department.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Chat Costs - The total estimated costs for vs as per the live chat estimates the

administrator set in the group's settings and the agents' hourly rates.

- Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the administrator set in the group's settings and the agents' hourly rates.
- Group - The specific group.
- Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Live Chat Time Cost - The total number of minutes charged for live chats as per the live chat estimates the administrator set in the group's settings.
- Messages Received - The total number of live chat or ticket messages received from customers.
- Messages Sent - The total number of live chat or ticket messages sent by agents.
- Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the administrator set in the group's settings.
- Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
- Total Calls - The total number of call logs that occurred during the time frame.
- Total Chats - The total number of live chat sessions that occurred during the time frame.
- Total New Tickets - The total number of tickets created during the time frame.
- Total Time - The total number of minutes that agents were on calls during the time frame.

Knowledge Base Reports

To access Knowledge Base reports, click the reports icon . Then expand the Summary Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available:

- KB Contribution - Shows the number of Knowledge Base articles an agent has created, edited, reviewed, flagged, or deleted during a set time period.
- KB Popularity - Shows the most viewed Knowledge Base articles by hits and visitors during a set time period. This report is useful for detecting which KB articles are frequently accessed and which KB articles need to be phased out.
- KB Searches - Shows the Knowledge Base searches made by portal visitors during a set time period. This report is useful for identifying what visitors to your site are searching for and for evaluating the performance of search strings.
- KB Searches Without Results - Shows the Knowledge Base searches made by portal visitors that did not return any search results during a set time period. This report is useful because it helps determine which KB articles should be added or which terms should be added to existing

articles.

- KB Searches Without Views - Shows the Knowledge Base searches made by portal visitors that did not result in article views during a set time period.
- KB Articles Created - Shows the number of Knowledge Base articles created during a set period of time. This report is useful because it provides an audit trail of all articles created by agents during a time period.
- KB Articles Modified - Shows the number of Knowledge Base articles edited during a set period of time. This report is useful because it provides an audit trail of all articles edited by agents during a time period.
- KB Article Events - Shows the number of times Knowledge Base articles were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the Knowledge Base during a time period.
- Flagged KB Articles - Shows the number of Knowledge Base articles currently flagged for review. Note: This report is not date-specific and always shows the articles that are currently flagged.
- Stale KB Articles - Shows the number of stale Knowledge Base articles currently in the system. Note: This report is not date-specific and always shows the articles that are currently stale.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Articles Added - The number of Knowledge Base articles added to the system.
- Articles Deleted - The number of Knowledge Base articles deleted from the system.
- Articles Edited - The number of Knowledge Base articles edited in the system.
- Articles Flagged - The number of Knowledge Base articles flagged for review in the system.
- Articles Reviewed - The number of distinct Knowledge Base articles reviewed by agents.
- Average Articles Viewed - The average number of articles a portal visitor viewed after conducting a search.
- Average Result Count - The average number of relevant articles displayed in search results.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the Knowledge Base article.
- Hits - The number of times a particular Knowledge Base article was viewed.
- Search String - The keywords queried by the portal visitor.
- Searches - The number of times a search was conducted for a particular keyword or term.
- Subject - The title of the Knowledge Base article.
- Visitors - The number of unique portal visitors that viewed a particular Knowledge Base article.

- Visitors Searching - The number of portal visitors that searched for a particular keyword or term.

Live Chat Reports

To access live chat reports, click the reports icon . Then expand the Summary Reports and Live Chat folders. The following live chat reports are available:

- Live Chat Overview - Shows an overall view of the organization's live chat usage during a set time period. The report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Incoming Live Chat Messaging - Shows the details of incoming messages of live chat sessions during a set time period. This report is useful because it helps to identify the average load of chat sessions and areas to increase or decrease message targets. Note: This report only applies to live chat initiated by customers.
- Incoming Live Chat Response Time - Shows the amount of time customers waited for a live chat response from agents during a set time period. This report is useful because it helps to identify problem areas where agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
- Incoming Live Chat Abandonment Time - Shows the abandonment rate for incoming live chats during a set time period. This report can be used to locate the areas in which more agents may be required or max chat settings may need adjusted to meet demand.
- Outgoing Live Chat Messaging - Shows the details of outgoing messages of live chat sessions during a set time period. Note: This report only applies to live chats initiated by agents.
- Outgoing Live Chat Response Time - Shows the amount of time customers wait for a live chat response from agents during a set time period. Note: This report only applies to live chats initiated by agents.
- Outgoing Live Chat Performance - Shows the total number of forced live chats and the total number of live chats invitations sent, ignored, accepted, and rejected for a specific department, group, or agent during a set time period. Note: This report only applies to live chats initiated by agents.
- Outgoing Live Chat Results - Shows the results of live chat invitations initiated by agents.

Depending on the report selected, the following report items are available:

- Accepted Chats With Response - The total number of live chat invitations to which customers accepted and responded.
- Accepted Chats Without Response - The total number of live chat invitations to which customers accepted but did not respond.

- Agent - The specific agent.
- Agents Using Reply - The number of agents that used a particular canned reply.
- Average Initial Response Time - The average number of seconds before the agent replies to the initial message from the customer.
- Average Longest Response Time - The average longest response time of all live chat sessions.
- Average Messages Received Per Chat - The average number of messages received during a live chat session.
- Average Messages Sent Per Chat - The average number of messages sent during a live chat session.
- Average Response Time - The average amount of time before an agent replied to a live chat message.
- Average Session Length - The average amount of time that a customer spent in a live chat.
- Department - The specific department.
- Forced Chats With Response - The total number of forced live chats to which customers responded.
- Forced Chats Without Response - The total number of forced live chats customers ignored.
- Group - The specific group.
- Messages Received - The total number of messages received from customers.
- Messages Sent - The total number of messages sent by agents.
- Time in Queue - The amount of time the live chat was in the queue before it was transferred to an agent.
- Total Accepted Chats - The total number of live chat invitations accepted by customers.
- Total Chats - The total number of live chat sessions that occurred during the time frame.
- Total Forced Chats - The total number of live chats forced by agents through Who's On.
- Total Invited Chats - The total number of live chat invitations sent to customers through Who's On.
- Total Invites Ignored - The total number of live chat invitations ignored by customers.
- Total Outgoing Chats - The total number of forced live chats and the total number of live chat invitations sent by agents through Who's On.
- Total Rejected Chats - The total number of live chat invitations rejected by customers.

News Reports

To access news reports, click the reports icon . Then expand the Summary Reports and News Reports folders. The following news reports are available:

- News Contribution - Shows the number of news items an agent has created, edited, reviewed, flagged, or deleted during a set time period.

- **News Popularity** - Shows the most viewed news items by hits and visitors during a set time period. This report is useful for detecting which news items are popular.
- **News Items Created** - Shows the number of news items created during a set period of time. This report is useful because it provides an audit trail of all news items created by agents during a time period.
- **News Items Modified** - Shows the number of news items edited during a set period of time. This report is useful because it provides an audit trail of all news items edited by agents during a time period.
- **News Items Events** - Shows the number of times news items were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the news system during a time period.
- **Flagged News Items** - Shows the number of news items currently flagged for review. Note: This report is not date-specific and always shows the news items that are currently flagged.

Depending on the report selected, the following report items are available:

- **Agent** - The specific agent.
- **Date** - The time frame during which the event occurs.
- **News Items Added** - The number of news items added to the system.
- **News Items Deleted** - The number of news items deleted from the system.
- **News Items Edited** - The number of news items edited in the system.
- **News Items Flagged** - The number of news items flagged for review in the system.
- **News Items Reviewed** - The number of distinct news items reviewed by agents.
- **Average News Items Viewed** - The average number of news items a portal visitor viewed after conducting a search.
- **News Item Date** - The date the news item was published.
- **Event** - The event that pertains to the news item.
- **Hits** - The number of times a particular news items was viewed.
- **Subject** - The title of the news item.
- **Visitors** - The number of unique portal visitors that viewed a particular news item.

Survey Reports

To access survey reports, click the reports icon . Then expand the Summary Reports and Survey Reports folders. The following survey reports are available:

- **Survey Conversion Rate** - Shows the number of surveys completed by customers compared to the number of surveys offered by agents during a set time period.
- **Survey Performance** - Shows the average rating of each survey.

Depending on the report selected, the following report items are available:

- Average Rating - The average overall score that the survey received.
- Conversion Rate - The percentage of surveys offered that were completed by customers.
- Survey Name - The name of the survey offered.
- Surveys Answered - The number of surveys completed by customers.
- Surveys Offered - The number of surveys offered to customers.

Note: A breakdown of survey results by level, agent, or survey is not available from the reporting section. This information is available in the survey section. To access this section, click the Knowledge button on the main toolbar and then click the Surveys navigation pane. Then expand Survey Results in the left tree view.

Ticket Reports

To access Ticket reports, click the reports icon . Then expand the Summary Reports and Tickets folders. The following Ticket reports are available:

- Tickets Overview - Shows an overall view of the organization's ticket sources during a set time period. This report is useful because it shows the source of tickets for each department, which can help managers analyze department loads.
- New Ticket Sources - Shows the methods customers used to submit tickets during a set time period.
- Re-opened Ticket Sources - Shows the number of re-opened tickets by roles for a specific department during a set time period.
- Ticket Statuses - Shows an overall view of the organization's ticket workload by status during a set time period. This report is useful in helping managers rebalance teams and change ticket weights effectively.
- Ticket Response Times - Shows the amount of time customers waited for a ticket response from agents during a set time period. Note: Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.
- Ticket Handling - Shows the overall activity of tickets by department, group, or agent during a set time period. This report focuses on the internal workload generated by tickets and the time required to actually resolve the issue.
- Ticket Workload - Shows the ticket workload by department, group, or agent. This report can be used to quickly identify how each team or agent is performing relative to others and to identify potential staffing changes.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.
- Average Messages Received Per Ticket - The average number of messages received before a ticket issue is resolved.
- Average Messages Sent Per Ticket - The average number of messages sent by agents before a ticket issue is resolved.
- Average Response Time - The average amount of time before an agent replied to a ticket.
- Average Time To Close - The average amount of time a ticket was in active status.
- Group - The specific group.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Messages Received - The total number of messages received from customers.
- Messages Sent - The total number of messages sent by agents.
- New Tickets By Agents - The total number of tickets created by agents.
- New Tickets By Email - The total number of tickets submitted by customers via email.
- New Tickets By Web Interface - The total number of tickets submitted by customers via the portal.
- Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
- Re-opened Tickets By Agents - The total number of tickets re-opened by agents.
- Re-opened Tickets By Users - The total number of tickets re-opened by users.
- Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
- Total Closed Tickets - The total number of closed tickets.
- Total New Tickets - The total number of tickets created during the time frame.
- Total Open Tickets - The total number of active tickets.
- Total Re-opened Tickets - The total number of tickets that were re-opened during the time frame.
- Total Tickets Locked - The total number of tickets that were closed and locked (cannot be re-opened) during the time frame.
- Total Tickets Replied To - The total number of tickets agents replied to.

Time Log Reports

To access time log reports, click the reports icon . Then expand the Summary Reports and Time Logs folders. The following time log reports are available:

- Call Time Log Overview - Shows an overall view of the organization's time log usage for calls during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Chat Time Log Overview - Shows an overall view of the organization's time log usage for live chats during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Ticket Time Log Overview - Shows an overall view of the organization's time log usage for tickets during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- Total Billable Time Logged - The total amount of billable time logged during the time frame.
- Total Billable Time Logs - The total number of billable time logs that occurred during the time frame.
- Total New Billable Time Logs - The total number of billable time logs created during the time frame.
- Total New Time Logs - The total number of new time logs created during the time frame.
- Total Time Logged - The total amount of billable time that occurred during the time frame.

Trend Reports

Call Trend Reports

To access call log reports, click the reports icon . Then expand Trend Reports and then Calls. The following call log trend reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Call Overview - Shows a view of the organization's overall call usage over time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- Day - The day of the week within the report's timeframe.
- Total Calls - The total number of calls that occurred during the time frame.
- Total Incoming Calls - The total number of incoming calls that occurred during the time frame.
- Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.
- Average Session Length - The average length of the calls in minutes.

Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand Trend Reports and then Canned Replies. The following canned reply reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Canned Reply Contribution Trend - Shows the number of times canned replies were created, edited, review, flagged, deleted, or inserted into tickets during a set time period.
- Canned Reply Popularity Trend - Shows the number of times agents used canned replies and the number of agents using canned replies reply during a set time period.

Depending on the report selected, the following report items are available:

- Day - The day of the week within the report's timeframe.
- Replies Added - The number of canned replies added to the system.
- Replies Deleted - The number of canned replies deleted from the system.
- Replies Edited - The number of canned replies edited in the system.
- Replies Flagged - The number of canned replies flagged for review in the system.
- Replies Reviewed - The number of canned replies reviewed by agents.
- Agents Using Reply - The number of agents that used canned replies.
- Times Used - The number of times agents used canned replies.
- Replies Inserted into Tickets - The number of canned replies inserted into ticket responses.

Cost Analysis Trend Reports

To access cost analysis reports, click the reports icon . Then expand Trend Reports and then Cost Reports.

Cost reporting is a way to estimate the amount of money that tickets and chats are costing you on a group, department, or user level. They can also be used to track costs by custom field or by end user to identify problem areas. Costs are estimated using a "per hour" amount assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Cost Trend - Shows an estimated cost of tickets, live chats, and call logs by department, group, agent, or customer over time. This report is useful because it allows managers to see how estimated costs are changing over time.
- Ticket Cost Trend - Shows a breakdown of ticket costs by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.
- Live Chat Cost Trend - Shows a breakdown of live chat by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.
- Call Cost Trend - Shows a breakdown of calls by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.

Depending on the report selected, the following report items are available:

- Day - The day of the week within the report's timeframe.
- Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Live Chat Costs - The total estimated costs for live chats as per the live chat estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Total Costs - The total estimated costs of tickets, calls, and live chats per the estimates the administrator set in the group's settings and the agents' hourly rates.
- Total New Tickets - The total number of tickets created during the time frame.
- Messages Sent - The total number of outgoing messages for that date.
- Messages Received - The total number of incoming messages for that date.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the administrator set in the group's settings.
- Estimated Ticket Costs - The total estimated costs based on Ticket Time Cost and the hourly rate assigned to agents.
- Total Live Chats - The total number of live chat sessions that occurred during the time frame.
- Live Chat Messages Sent - The total number of outgoing live chat messages.
- Live Chat Messages Received - The total number of incoming live chat messages.
- Incoming Live Chat Transfers - The total number of live chats transferred to a specific department from another department.
- Live Chat Time Cost - The total number of minutes charged for live chat as per the formulas

set in group configuration.

- **Estimated Live Chat Costs** - The total estimated costs based on Live Chat Time Cost and the hourly rate assigned to agents.
- **Incoming Chat Transfers** - The total number of live chats transferred to a specific department from another department.
- **Total Calls** - The total number of call logs that occurred during the time frame.
- **Call Time Cost** - The total number of minutes charged for calls as per the formulas set in group configuration.
- **Estimated Call Costs** - The total estimated costs based on Call Time Cost and the hourly rate assigned to agents.

Knowledge Base Trend Reports

To access Knowledge Base reports, click the reports icon . Then expand the Trend Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- **KB Contribution Trends** - Shows the number of Knowledge Base articles created, edited, reviewed, flagged, or deleted over time.
- **KB Popularity Trend** - Shows the most viewed Knowledge Base articles by hits and visitors over time.
- **KB Searches Trend** - Shows the Knowledge Base searches made by portal visitors over time. This report is useful because it helps managers gauge whether their Knowledge Base is becoming more or less effective over time.

Depending on the report selected, the following report items are available:

- **Articles Added** - The number of Knowledge Base articles added to the system.
- **Articles Edited** - The number of Knowledge Base articles edited in the system.
- **Articles Flagged** - The number of Knowledge Base articles flagged for review in the system.
- **Articles Reviewed** - The number of distinct Knowledge Base articles reviewed by agents.
- **Articles Deleted** - The number of Knowledge Base articles deleted from the system.
- **Visitors** - The number of unique portal visitors that viewed a particular Knowledge Base article.
- **Visitors Searching** - The number of portal visitors that searched for a particular keyword or term.
- **Searches** - The total number of searches performed.
- **Average Result Count** - The average number of results returned per search.
- **Average Articles Viewed** - The average number of search results that were viewed per search.

- **Searches Resulting in Views** - Of the Searches performed, the total number that actually returned a result that was viewed by the person performing the search.
- **Percent Finding** - The percentage of searches that produced viewable results. This is essentially the number of Searches Resulting in Views divided by Searches.

Live Chat Trend Reports

To access live chat reports, click the reports icon . Then expand Trend Reports and then Live Chat.

The following live chat reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- **Live Chat Overview Trend** - Shows an overall view of the organization's live chat usage over time. This report is useful because it provides managers with an at-a-glance view of the company and can help identify areas to investigate with more detailed reports.
- **Incoming Live Chat Messaging Trend** - Shows the details of incoming messages of live chat sessions over time. This report is useful because it can identify if chat sessions are getting more or less chatty over time. Note: This report only applies to live chat initiated by customers.
- **Incoming Live Chat Response Time Trend** - Shows the amount of time customers waited for a live chat response from agents over time. This report is useful because it can help managers identify problem areas in which agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
- **Incoming Live Chat Abandonment Time Trend** - Shows the relationship between wait time in the queue and abandonment rates over time. This report is useful in forecasting when more agents may be needed or when max chat settings need to be adjusted to meet demand.
- **Outgoing Live Chat Messaging Trend** - Shows the details of outgoing messages of live chat sessions over time. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Response Time Trend** - Shows the amount of time customers wait for a live chat response from agents over time. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Performance Trend** - Shows the total number of forced live chats and the total number of live chats invitations sent, ignored, accepted, and rejected for a specific department, group, or agent over time. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Results Trend** - Shows the results of live chat invitations initiated by agents.

Depending on the report selected, the following report items are available:

- Total Live Chats - The total number of live chat sessions that occurred during the time frame.
- Total Incoming Live Chats - The total number of live initiated from the portal or from chat links on a website.
- Total Outgoing Live Chats - The total number of forced live chats and the total number of live chat invitations sent by agents through Who's On.
- Average Time in Queue - The average amount of time a live chat sat in the queue prior to being assigned to, or taken by, an agent.
- Average Session Length - The average amount of time that a customer spent in a live chat.
- Average Response Time - The average amount of time before an agent replied to a live chat message.
- Live Chat Messages Received - The total number of messages received from customers.
- Live Chat Messages Sent - The total number of messages sent by agents.
- Average Messages Received Per Live Chat - The average number of messages received during a live chat session.
- Average Messages Sent Per Live Chat - The average number of messages sent during a live chat session.
- Average Initial Response Time - The average time for a live chat to be initially responded to by an agent.
- Average Longest Response Time - The average longest time for a live chat to be initially responded to by an agent.
- Total Abandoned Live Chats - The total number of live chats that were started by an end user but abandoned prior to being taken by, or assigned to, an agent.
- Live Chats Abandoned After Assigned - The total number of live chats that were started by an end user then abandoned after being taken by, or assigned to, and agent.
- Average Abandoned Sessions Length - The average time for sessions that were abandoned, regardless of being assigned to, or taken by, an agent.
- Total Forced Live Chats - The total number of live chats forced by agents through WhosOn.
- Total Invited Live Chats - The total number of live chat invitations sent to customers through Who's On.
- Total Accepted Live Chats - The total number of live chat invitations accepted by customers.
- Total Rejected Live Chats - The total number of live chat invitations rejected by customers.
- Total Invites Ignored - The total number of live chat invitations ignored by customers.
- Total Forced Live Chats Without Response - The total number of forced live chats customers ignored.
- Forced Chats With Response - The total number of forced live chats to which customers responded.
- Accepted Live Chats Without Response - The total number of live chat invitations to which

customers accepted but did not respond.

- Accepted Live Chats With Response - The total number of live chat invitations to which customers accepted and responded.
- Agent - The specific agent.

News Trend Reports

To access news reports, click the reports icon . Then expand the Trend Reports and News Reports folders. The following news reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- News Contribution Trend - Shows the number of news items created, edited, reviewed, flagged, or deleted over time.
- News Popularity Trend - Shows the most viewed news items by hits and visitors over time.

Depending on the report selected, the following report items are available:

- News Added - The number of news items added to the system.
- News Deleted - The number of news items deleted from the system.
- News Edited - The number of news items edited in the system.
- News Flagged - The number of news items flagged for review in the system.
- News Reviewed - The number of distinct news items reviewed by agents.
- Hits - The number of times a particular news items was viewed.
- Visitors - The number of unique portal visitors that viewed a particular news item.

Survey Trend Reports

To access survey reports, click the reports icon . Then expand the Trend Reports and Survey Reports folders. The following survey reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Survey Conversion Rate Trend - Shows the number of surveys completed by customers compared to the number of surveys offered by agents over time.
- Survey Performance Trend - Shows the average rating of surveys over time.

Depending on the report selected, the following report items are available:

- Average Rating - The average overall score of surveys over time.
- Conversion Rate - The percentage of surveys offered that were completed by customers.
- Surveys Answered - The number of surveys completed by customers.
- Surveys Offered - The number of surveys offered to customers.

Note: A breakdown of survey results by level, agent, or survey is not available from the reporting section. This information is available in the survey section. To access this section, click the Knowledge button on the main toolbar and then click the Surveys control bar. Then expand Survey Results in the left tree view.

Ticket Trend Reports

To access Ticket reports, click the reports icon . Then expand the Trend Reports and Tickets folders. The following Ticket trend reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Tickets Overview Trend - Shows an overall view of the organization's Ticket sources over time.
- New Ticket Source Trend - Shows the methods customers used to submit Tickets over time.
- Re-opened Ticket Source Trend - Shows the number of re-opened Tickets by roles for a specific department over time. This report is useful because it shows how the source of re-opened Tickets has changed.
- Ticket Status Trend - Shows an overall view of the organizations Ticket workload by status over time. This report is useful because it shows how workload has changed and provides the information needed to rebalance teams, predict trends, or change Ticket weights effectively.
- Ticket Response Time Trend - Shows the amount of time customers waited for a Ticket response from agents over time. Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.
- Ticket Handling Trend - Shows overall activity of Tickets over time. This report is useful because it shows the change in internal workload generated by Tickets and the time required to actually resolve the issue.
- Ticket Workload Trend - Shows overall Ticket workload over time. This report is useful for identifying potential staffing change needs.

Depending on the report selected, the following report items are available:

- Average Follow-up Response Time - The average amount of time before agents replied to Tickets.
- Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.
- Average Messages Received Per Ticket - The average number of messages received before a Ticket issue is resolved.
- Average Messages Sent Per Ticket - The average number of messages sent by agents before a

Ticket issue is resolved.

- Average Response Time - The average amount of time before an agent replied to a Ticket.
- Average Time Open and Active - The average amount of time a Ticket was in active status.
- Average Time to Close - The average amount of time a ticket was open before it was closed.
- Department - The specific department name.
- Group - The specific group name.
- Incoming Ticket Transfers - The total number of Tickets transferred to a specific department from another department.
- Messages Received - The total number of messages received from customers.
- Messages Sent - The total number of messages sent by agents.
- New Tickets By Agents - The total number of Tickets created by agents.
- New Tickets By Web Interface - The total number of Tickets submitted by customers via the portal.
- New Tickets Received By Email - The total number of Tickets submitted by customers via email.
- Outgoing Ticket Transfers - The total number of outgoing Tickets transferred to a specific department from another department.
- Re-opened Tickets By Agents - The total number of Tickets re-opened by agents.
- Re-opened Tickets By Users - The total number of Tickets re-opened by users.
- Tickets Assigned From Queue - The total number of Tickets that were assigned to an agent after spending time in the queue.
- Total Closed Tickets - The total number of closed Tickets.
- Total Closed Ticket by Customers - The total number of tickets closed by customers.
- Total Modified Tickets - The total number of Tickets that changed status or priority. Note: This includes Tickets that agents replied to regardless of their status in the system.
- Total New Tickets - The total number of Tickets created.
- Total Open Tickets - The total number of active Tickets.
- Total Re-opened Tickets - The total number of Tickets re-opened.
- Total Tickets Auto-closed - The total number of Tickets that automatically closed.
- Total Tickets Locked - The total number of Tickets that were closed and locked.
- Total Tickets Replied To - The total number of Tickets agents replied to.

Time Log Trend Reports

To access time log trend reports, click the reports icon . Then expand the Trend Reports and Time Logs folders. The following time log reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- **Call Time Log Overview** - Shows an overall view of the organization's time log usage for callsover time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- **Chat Time Log Overview** - Shows an overall view of the organization's time log usage for live chats over time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- **Ticket Time Log Overview** - Shows an overall view of the organization's time log usage for tickets over time. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- **Total Billable Time Logged** - The total amount of billable time logged.
- **Total Billable Time Logs** - The total number of billable time logs that occurred.
- **Total New Billable Call Time Logs** - The total number of billable time logs created.
- **Total New Time Logs** - The total number of new time logs created.
- **Total Time Logged** - The total amount of billable time that occurred.

Survey Results

Survey results are available by clicking the reports icon , expanding Survey Results and clicking the appropriate brand in the navigation pane. Alternately, survey results can be viewed by agent or by specific survey. Note: Only employees with the manager role enabled can access survey results. To view a specific survey result, simply double-click a survey result. The survey questions will load in the content pane and the following columns will be available:

- **Question** - The text of the survey question.
- **Answer** - The customer's answer to the survey question.
- **Score** - The score the agent received on the question. Generally, higher scores indicate better performance.
- **Max Score** - The highest possible score the agent could receive on the question.
- **Weight** - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

In general the following options are available in the content pane toolbar:

- **Actions** - Click this button and select the appropriate option to view related items or specific survey results.

- Related Item - Displays the ticket or live chat associated to the selected survey result.
- Results - Displays the survey questions and responses for the selected survey result.

Viewing Survey Results by Brand

To view survey results by brand, click the reports icon , expand Survey Results and click the appropriate brand in the navigation pane. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results By Agent

To view survey results by agent, click the reports icon and expand Survey Results in the navigation pane. Then expand By Agent and select the desired agent. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results by Survey

To view results by survey, click the reports icon and expand Survey Results in the navigation pane. Then expand By Survey in the and select the desired survey. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Events

Events Overview

SmarterTrack can detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

SmarterTrack's events system can also automate actions to streamline operations. For example, the administrator can configure an event so that the system automatically sends live chat invitations to idle portal visitors.

There are two categories of events in SmarterTrack: agent-level events and system-level events:

- Agent-level events are created by agents and they are specific to each agent's role and permission level within SmarterTrack.

- System-level events can only be set by administrators and cover both agent- and system-level items such as SMTP errors, idle times and more.

To view agent-level events, click the settings icon . Then expand My Settings and click My Events in the navigation pane. Any agent-level events will load in the content pane. Events can also be viewed by event group or category (chat room, knowledge base, tickets, etc.).

To view system-level events, administrators click the settings icon . Then expand System Settings and click System Events in the navigation pane. Any system-level events will load in the content pane. Events can also be viewed by event group or category (chat room, knowledge base, tickets, etc.). Note: Administrators can access both agent-level and system-level events.

Navigating Your Events

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the toolbar.
- Name - The name of the event.
- Event Category - The feature to which the event pertains (tickets, survey, Who's On, etc.).
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered. Actions include emails, notifications, logging, and other event-specific functions.

Performing Event Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new event.
- Edit - Allows the agent to make changes to an event's settings.
- Delete - Permanently deletes the selected event(s).
- Search - Allows the agent to search for a specific event.

To view the settings for a specific event, simply double-click the event and the event settings will load in the content pane.

Employee Events

The employee events page displays all events that were created by individual employees.

Administrators and managers will want to look at these events occasionally to ensure that employees are using the event system correctly and productively.

Creating New Events

To add a new agent-level event, click the settings icon . Then expand the My Settings folder, click My Events in the navigation pane toolbar and then click New in the content pane toolbar.

To add a new system-level event, click the settings icon . Then expand the System Settings folder, click System Events in the navigation pane and then click New in the content pane toolbar. Notes: Only administrators can add system-level events.

This will open a new event window with the following fields:

- Name - The friendly name of the event.
- Category - The feature to which the event pertains (Tickets, Survey, Who's On, etc.)
- Type - Based on the Category, what happens that will cause the event to fire.

After completing the fields in the new event window, the following tabs will load in the content pane:

Conditions

Use this tab to edit the following settings:

- Name - The name of the event.
- Event Group - The folder in which the event is saved.
- Event Type - The event that triggers the action.

Depending on the event category and type selected, different event action criteria will be available.

For more information on the various event action criterions, see the corresponding event category page of the online help.

Actions

If the actions tab is blank, click Add Action to edit the following settings:

- Action - The action that occurs when an event is triggered.
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list.

Other options may be available depending on the event category chosen.

Manual Events

Manual events allow agents and managers to add multiple actions to a single event, then trigger the event whenever they want versus waiting for the system to execute them automatically. For example, agents may want to transfer a ticket to another department, send a canned reply to the customer, adjust

the custom fields in preparation to track the ticket, and SMS the agent that will receive the transferred ticket. Instead of the agent having to perform all of these actions separately, manual events can make all this happen with just one click.

Call Log Events

Administrators and agents can receive notifications or automate actions based on the following call log events:

- Call Log Attached to Ticket
- Call Log Created
- Call Log Deleted
- Call Log Detached from Ticket
- Call Log Modified
- Call Log Time Log Created
- Manual Call Log Event

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Subject - The words that will trigger the event if found within the call log subject.
- Acting Agent - The agent that added a comment to the call log.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the call log.
- Phone Number - The phone number that will trigger the event.
- Name - The name that will trigger the event.
- Email Address - The email address that SmarterTrack uses to send email.
- Incoming Call - The type of call that will trigger the event. Note: If the type of call is an incoming call, type "true" in the field. If it is not, type "false" in the field.
- Start Date - The start date of the call.
- End Date - The ending date of the call.
- Description - The words that will trigger the event if found within the description of the call log.

Actions

Note: Event criteria based on any custom fields the administrator has established may also be available.

Depending on the event type selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Transfer Call Log - Transfers the call log to the Group and Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Chat Room Events

Administrators and agents can receive notifications or automate actions based on the following chat room events:

- Chat Room Invite
- Chat Room Joined
- Chat Room Left

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Agent - The agent that invited, joined, or left the agent-to-agent chat.
- Name - The name of the chat room that triggers the event.
- Sent Message - The words that will trigger the event if found within a sent message of the chat.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Live Chat Events

Administrators and agents can receive notifications or automate actions based on the following live chat events:

- Live Chat Attached to Ticket
- Live Chat Comment Added

- Live Chat Count for Agent
- Live Chat Count for Department
- Live Chat Count for Group
- Live Chat Deleted
- Live Chat Detached from Ticket
- Live Chat Ended
- Live Chat Idle
- Live Chat Incoming Message
- Live Chat Outgoing Message
- Live Chat Started
- Live Chat Time Log Created
- Live Chat Transferred
- Manual Live Chat Event

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all live chats in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk. While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" chats, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 minutes." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Idle Minutes - The number of minutes a live chat is idle before the event is triggered.
- Acting Agent - The agent that added a comment to the live chat.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the live chat.

- Open Date - The date the live chat was initiated.
- Customer Name - The name of the customer.
- Customer Username - The customer's username.
- Customer Email - The customer's email address.
- Question - The words that will trigger the event if found within a the text of the chat.
- Customer IP - The customer's IP address.
- Language - The language that will trigger the event.
- Messages Sent - The number of messages sent during the live chat.
- Messages Received - The number of messages received during the live chat.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- End Chat - Ends the chat by the agent.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Transfer Live Chat - Transfers the chat to the Group and Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are

used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Knowledge Base Events

Administrators and agents can receive notifications or automate actions based on the following knowledge base events:

- KB Article Created
- KB Article Deleted
- KB Article Flagged for Review
- KB Article Modified
- KB Article Reviewed
- KB Article Stale
- KB Feedback Abuse Reported
- KB Feedback Approved
- KB Feedback Blocked
- KB Feedback Created
- KB Feedback Deleted
- KB Feedback Edited
- Manual KB Event

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Agent - The agent that modifies or creates articles.
- Folder - The folder in which the knowledge base article is saved.
- Article Title - The words that will trigger the event if found within the article title.
- Keywords - The words that will trigger the event if listed as article keywords.
- Summary - The words that will trigger the event if found within the article summary.
- Body Text - The words that will trigger the event if found within the body of the article.
- Marked as Draft - The article status that will trigger the event.

- Marked as Private - The article status that will trigger the event.
- Flagged for Review - The article status that will trigger the event.

Actions

Depending on the event selected, the following actions are available:

- Alter Item Properties - Allows you to automatically change an article's Draft, Public/Private and Review status.
- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

POP Events

Administrators can receive notifications or automate actions based on the following POP events:

- POP Connection Failed
- POP Download Failed
- POP Import Failed
- POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Server Name - The name of the server that SmarterTrack failed to connect to.
- Server Port - The port that SmarterTrack attempted to connect to on the server.
- Login Username - The username used to authenticate with the server.
- SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

SMTP Events

Administrators can receive notifications or automate actions based on the following SMTP events:

- SMTP Connection Failed
- SMTP Delivery Failed
- POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.

- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- SMTP Server - The name of the server that SmarterTrack failed to connect to.
- Server Port - The port that SmarterTrack attempted to connect to on the server.
- Email Address - The email address that SmarterTrack uses to send email.
- SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.
- Requires Authentication - The authentication required connect to the server. Note: If the server requires authentication, type "true" in the field. If it does not, type "false" in the field.
- Customer Email - The customer's email address.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Survey Events

Administrators and agents can receive notifications or automate actions based on the following survey event:

- Survey Answered

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.

- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Survey Name - The survey that triggers the event.
- Survey Rating - The rating that triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Task Events

Administrators and agents can receive notifications or automate actions based on the following Task events:

- Manual Task Event
- Task Created
- Task Deleted
- Task Due
- Task Modified
- Task Started

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.

- Day of Week - The day(s) of the week during which the event occurs.
- Subject - The words that will trigger the event if found within the task subject.
- Acting Agent - The agent that added a comment to the ticket.
- Agent Assigned - The agent that is assigned the task.
- Old Agent Assigned - The agent previously assigned the task.
- Status - The task status that will trigger the event.
- Priority - The priority level that will trigger the event.
- Related Item - A related email ticket, live chat or call log.
- Description - The words that will trigger the event if found within the description of the task.
- Start Date - The start date of the task.
- Due Date - The due date of the task.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Create Task - Creates a new task with the customized Subject, Description, Priority and Status specified.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Set Task Priority - Sets the task priority (low, normal, high, urgent). This is generally used in conjunction with another action.
- Set Task Status - Sets the task status (Under Consideration, In Progress, On Hold, In Review, Completed, Rejected, Approved). This is generally used in conjunction with another action, such as "Send Canned Reply".
- Transfer Task - Transfers the task to the Agent specified
- Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the

max frequency set, regardless of how many times the event is fired.

- Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Ticket Events

Administrators and agents can receive notifications or automate actions based on the following ticket events:

- Manual Ticket Event
- Ticket Closed by User
- Ticket Commend Added
- Ticket Count for Agent
- Ticket Count for Group
- Ticket Count for Department
- Ticket Created
- Ticket Deleted
- Ticket Followed Up
- Ticket Follow-up Due
- Ticket Follow-up Scheduled
- Ticket Idle
- Ticket Messages Received
- Ticket Messages Sent
- Ticket Priority Changed
- Ticket Status Changed
- Ticket Time Log Created
- Ticket Transferred

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all tickets in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk.

While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" tickets, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 minutes." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Acting Agent - The agent that added a comment to the ticket.
- Old Department - The department assigned to the ticket prior to transfer.
- Old Group - The group assigned to the ticket prior to transfer.
- Old Agent Assigned - The agent assigned to the ticket prior to transfer.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the ticket.
- Customer Email - The customer's email address.
- Subject - The words that will trigger the event if found within the ticket subject.
- Priority - The priority level that will trigger the event.
- Status - The ticket status that will trigger the event.
- Idle Minutes - The number of minutes a ticket is idle before the event is triggered.
- Follow-up Due Minutes - The number of minutes prior to the due date and time that will trigger the event.
- Follow-up Past Due Minutes - The number of minutes after the due date and time that will trigger the event.
- Pinned to Agent - The ticket status that will trigger the event.
- Messages Sent - The total number of outgoing tickets that will trigger the event.
- Messages Received - The total number of incoming tickets that will trigger the event.
- Body Text - The words that will trigger the event if found within the body of the ticket.
- Comment Type - The type of comment (note, resolution, transfer note) that will trigger the event.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event type that is selected, the following actions are available:

- **Call Web Page** - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- **Log to File** - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- **Log to File (once per item)** - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- **Notify External Provider** - Calls an external provider that is created by the customer. For more information, see External Providers .
- **Offer Survey** - Initiates a survey to the end user.
- **Send Canned Reply** - Automatically sends a specific canned reply.
- **Send Email** - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.
- **Send Email (once per item)** - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting. For example, if six tickets trip an email ticket IDLE event, one email is sent for each ticket that fires the event.
- **Send Reply to Ticket** - Automatically sends an email reply to the ticket. The reply is customized based on the event.
- **Set Ticket Priority** - Sets the ticket priority (low, normal, high, urgent). This is generally used in conjunction with another action.
- **Set Ticket Status** - Sets the ticket status (active, waiting, closed, closed and locked). This is generally used in conjunction with another action, such as "Send Canned Reply".
- **Transfer Ticket** - Transfers the ticket to the Group and Agent specified
- **Use Default Notification Profile for User** - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- **Use Default Notification Profile for User (once per item)** - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Who's On Events

Administrators and agents can receive notifications or automate actions based on the following Who's On events:

- Live Chat Accepted
- Live Chat Forced
- Live Chat Invitation Ignored
- Live Chat Invited
- Live Chat Rejected
- Online Activity

In addition to the events listed above, administrators can receive notifications or automate actions on the following Who's On events:

- Online Visitor Purged
- Online Visitor Removed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Acting Agent - The agent that added a comment to the ticket.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Sent Message - The words that will trigger the event if found within a sent message of the chat.
- Customer Name - The customer that will trigger the event.
- Customer Email Address - The email address that will trigger the event.
- IP Address - The IP address that will trigger the event.

- Host Name - The host name that will trigger the event.
- Host Domain - The host domain that will trigger the event.
- Session Start Time - The time frame during which the customer visited the website or portal.
- Hits - The number of times a page is hit before triggering the event.
- Duration Minutes - The number of minutes the visitor has been on the website or portal.
- Idle Minutes - The number of minutes a ticket sits idle before the event will trigger.
- Country - The geographic location of the visitor that will trigger the event.
- Region - The geographic location of the customer that will trigger the event.
- Language - The default browser language of the user that will trigger the event.
- Browser - The Web browser that will trigger the event.
- Operating System - The operating system that will trigger the event.
- Live Chat Status - The live chat status that will trigger the event.
- Initial Page - The Web page that will trigger the event if viewed at the beginning of the customer's session.
- Initial Virtual Page - The virtual page that will trigger the event if viewed at the beginning of the customer's session.
- Initial Page Title - The title of the initial page.
- Initial Referrer - The Web page that the user was on prior to coming to site that will trigger the event.
- Current Page - The Web page that will trigger the event.
- Current Virtual Page - The virtual page that will trigger the event.
- Current Page Title - The title of the current page the visitor is browsing.
- Current Referrer - The referrer that will trigger the event.
- Live Chat Invites Sent - The number of live chat invites sent by an agent(s) that will trigger the event.
- Live Chat Invites Rejected - The number of live chat invites rejected by customers that will trigger the event.
- Live Chat Invites Accepted - The number of live chat invites accepted by customers that will trigger the event.
- Live Chat Invites Ignored - The number of live chat invites ignored by customers that will trigger the event.
- Live Chats Forced - The number of live chats forced by an agent(s) that will trigger the event.
- Invitation Last Sent Date - The date the customer last received a live chat invitation.
- Last Live Chat Date - The date the customer last participated in a live chat.
- First Chat Date - The date the customer first participated in a live chat.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Settings

My Settings

Preferences

To edit your personal settings in SmarterTrack, click the settings icon , then expand My Settings and click Preferences in the navigation pane. Your user settings will load in the content window and the following tabs will be available:

Options

Use this tab to edit the following user settings:

- Username - The username that is used to login to SmarterTrack
- Authentication - The method used to login to SmarterTrack. The administrator can choose to allow users to log in using a standard password, authenticate against active directory or by using an external provider that integrates your log in with an external, third-party product like a CRM or control panel.
- Authentication Domain - When Active Directory authentication is used, this is the domain name used for the authentication of your login username and password.
- Email Address - The agent's email address.

- **Display Name** - The friendly name used to identify the agent within the SmarterTrack system.
- **Time Zone** - To specify the time zone, select the appropriate time zone from the list. While the default time zone is set by the administrator, agents can adjust their time zone based on their location. This is helpful for those companies that have customer service agents working in different geographic locations.
- **Avatar** - The display picture the agent uses when interacting with customers via Live Chat.
- **New Image** - To change the avatar, click Browse and select the appropriate file from your local machine.

Roles

This tab displays the roles assigned to you. An user's permissions are defined by their roles, which are assigned by a SmarterTrack administrator. For more information, see [Roles](#) . Note: Users cannot edit the roles to which they have been assigned. Only an administrator can change a user's role .

Web Interface

Use this tab to edit the following settings:

- **Spell-Check Dictionary** - Agents have the ability to select the default spell-check dictionary to use for tickets and live chats. By default, SmarterTrack includes dictionaries for over 15 different languages.
- **Enable automatic reminder popup** - Checking this box will allow the agent to receive new reminders in a pop-up window. By default, this option is enabled.

Tickets

Use this tab to edit the following settings regarding the handling of tickets:

- **Forward To** - There are times when agents want to reply to tickets from an email client or from within webmail. Adding a "forward to" address means that any ticket that is assigned to the agent will be forwarded to this email address.
- **Enabled** - Checking this box will allow tickets to be forwarded to an agent's email address. This should be disabled if the agent will use the SmarterTrack management interface for replying to tickets.
- **Allow Replies From** - To specify an alternate email address to use when replying to tickets, type the email address in this field.
- **Display waiting ticket counters in left tree** - Checking this box will display the total number of tickets for which the agent is responsible that are waiting for a customer response. By default, this option is enabled.
- **Display ticket follow-up counters in left tree** - Checking this box will display the total number

of tickets for which the agent is responsible that is marked as needing a follow-up. By default, this option is enabled.

- Include waiting tickets in root tree item counts - Checking this box will include tickets that are waiting for a customer response toward the total number of tickets for which an agent is responsible. By default, this option is disabled.
- Include tickets scheduled for follow-up in root tree item counts - Checking this box will include tickets that are marked as needing a follow-up toward the total number of tickets for which an agent is responsible. By default, this option is disabled.

Live Chat

Use this tab to edit the following settings regarding the handling of live chats:

- Agent Alias - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact with customers.
- Max Active Live Chats - To change the number of live chats the agent can participate in at a time, type the appropriate number in this field. By default, this option is set to 1.
- Enable automatic live chat popup - Checking this box will display new live chats in a popup window. By default, this option is enabled.
- Enable live chat notification sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
- Enable live chat in queue notification sound - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
- Welcome Message - To specify a default message that is displayed when a customer first enters a chat, type the message in this field.
- Default Invitation Message - To specify a default message to invite customers to live chat, type the message in this field.

VOIP

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator. Up to 4 different phone numbers can be added for any given agent.

Reporting

Use this tab to specify the following settings for reporting purposes:

- Hourly Cost - The hourly cost for the agent to work with tickets and chats. This field is used

for cost analysis reporting and is set to 10.00 by default. Note: This option is only available to administrators.

Custom Fields

This tab displays the available custom fields for user preferences. For more information on custom fields, see Field Definitions .

Notification Profiles

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

Notification profiles determine how those messages are sent. Options include text message or email.

To view a list of current notification profiles, click the settings icon . Then expand My Settings folder and click Notification Profiles in the navigation pane. All of the notification profiles for the agent will load in the content pane.

Administrators can view notification profiles for system-wide notifications by clicking the settings icon . Then expand the System Settings folder and click Notification Profiles in the navigation pane. All of the system-wide notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification the agent has enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Allows the agent to edit an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile.

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enabled - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Enable reminders - Checking this box will allow the agent to receive notifications in a pop-up window.

For more information about notification profiles and events, see [Events Overview](#) .

System Settings

General Settings

Administrators will use this section to adjust any general system settings, including company information, currency format, the default skin, and the map provider.

To access this section, click the settings icon . Then expand the System Settings folder and click General Settings in the navigation pane. The general settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following system settings:

- SmarterTrack Base URL - The URL for the SmarterTrack portal.
- Server Friendly Name - The name of the server.
- Locale for Currency - To specify the format in which currency is displayed for cost calculation reports, select the appropriate option from the list. By default, the locale is set to English (United States).
- Spell-check Dictionary - Select which dictionary SmarterTrack will use to check for spelling errors from the list.
- Default Time Zone - Select the time zone SmarterTrack will use as the default from the list. More often than not, this time zone should match your current location. However, it can be adjusted to account for offices in other geographic locations.
- Default Skin - Select which skin SmarterTrack will use as the default skin from the list.
- Color Scheme - Select the color scheme SmarterTrack will use as the default for the portal and management interface.
- Allow employees to override default skin - Checking this box will allow agents to override the default skin.

Colors

Use this tab to modify the default color schemes for various parts of the SmarterTrack management interface . Note: For information on customizing the color scheme for the customer-facing portal for your brands, see the section on Brand settings . The color options are:

- **Primary Color:** - This is the background color for the title bars as well as the number badges that denote the number of items across the management interface. (E.g., the number of tickets). The default is #055E8A.
- **Secondary Color:** - This is the background color for the button bar in the content and navigation panes. (E.g., New, Actions). The default is #222222.
- **Link Color:** - This is the color for any links, headers and numeric indicators that appear in the content and navigation panes. (E.g, column headers). The default is #0088CC.

To revert a color back to its default, you can either re-type the default color code as listed above, or simply delete the custom code and save your changes. When a color field is left blank, SmarterTrack will simply revert the field back to its default.

Features

Use this tab to enable to the following features:

- **Enable employee chat rooms** - Checking this box will allow employees to view and use chat rooms within the management interface. By default, this setting is enabled. For more information on chat rooms see the Chat Rooms page.
- **Enable employee instant messenger** - Checking this box will allow employees to view and use the instant messenger within the management interface. By default, this setting is enabled. For more information on chat rooms see the Instant Messenger Overview page.
- **Enable simultaneous login to the portal and management interface** - Checking this box will allow employees to log in to both the portal and management interface at the same time. By default, this setting is disabled.
- **Enable confirmation when an agent is the last to go inactive for a group/department** - Checking this box will display a confirmation box to the last agent to log out of a department or group letting them know, and havign them acknowledge, that they are the last agent to log out.

Call Logs

Use this tab to enable the following features when using SmarterTrack Communicator:

- **Purge recordings After** - This settings allow you to automatically purge recorded phone calls after a certain number of days or after reaching a certain storage limit. This helps save disk

space on the SmarterTrack server. By default, this is set to 30 days. Note: This setting will only affect agents using SmarterTrack Communicator as it automatically records calls.

- Purge Recordings After - This setting will automatically purge recorded calls after they reach a certain size. By default this is set to 2000MB (2GB). Note: This setting will only affect agents using SmarterTrack Communicator as it automatically records calls.
- Enable personal calls - Checking this box allows agents to make personal calls from SmarterTrack Communicator.

Files

Use this to specify the types of files that can be uploaded to SmarterTrack.

- Allowed extensions for document uploads in HTML editor (one per line) - These are the file types that agents can attach to tickets. In general, agents should be able to attach any file type to a ticket. To allow this, simply add an asterisk (*). However, there may be times when administrators will want to limit file attachments to simply images or documents. To restrict agents to specific file types, add the extensions here, one per line, and include the dot. (I.e., .JPG not simply JPG)
- Allowed extensions for end user file uploads (one per line) - These are the file types that customers and end users can upload to agents when submitting tickets from the portal. In general, it's a good idea to limit customers from uploading file types that may prove harmful, such as program files. To restrict end users and allow only specific file types, add the extensions here, one per line, and include the dot. (I.e., .JPG not simply JPG)

Custom CSS

SmarterTrack allows administrators to stylize their portal and/or the management interface with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them.

To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can then create a version of that style yourself, and then paste it in the box to override the default. Realize this will happen wherever that style is used, so changing one style can affect both the portal and the management interface.

To revert back to the default style, simply remove your custom style from here and save your changes.

Security

Use this tab to enable various password requirements for registered users. These settings give administrators greater control over the initial level of security for their systems and helpdesks.

Enable password reset - When checked, this setting allows agents, managers and administrators to reset their passwords from the management interface login screen. Clicking the link and filling out the username and CAPTCHA will send an email with a password reset link to the email address associated with the username. Note: If using external providers or active directory authentication, this feature should not be enabled.

Enable brute force protection - When checked, this setting enables SmarterTrack's brute force protection. Therefore, if a "user" attempts to log in to SmarterTrack more than 10 times in 5 minutes they are locked out for 5 minutes. After 5 minutes they are able to attempt additional log ins.

Notification Profiles

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

Notification profiles determine how those messages are sent. Options include text message or email.

To view a list of current notification profiles, click the settings icon . Then expand My Settings folder and click Notification Profiles in the navigation pane. All of the notification profiles for the agent will load in the content pane.

Administrators can view notification profiles for system-wide notifications by clicking the settings icon . Then expand the System Settings folder and click Notification Profiles in the navigation pane. All of the system-wide notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification the agent has enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Allows the agent to edit an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile.

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enabled - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Enable reminders - Checking this box will allow the agent to receive notifications in a pop-up window.

For more information about notification profiles and events, see [Events Overview](#) .

External Providers

Administrators with programming knowledge can extend the functionality of SmarterTrack through the use of external providers. By integrating external providers into SmarterTrack, companies can:

- Integrate their login system to LDAP.
- Copy the user's ID that the billing system uses into a custom field in SmarterTrack for easy reporting.
- Show and hide custom fields based on the department a user has chosen.
- Redirect any tickets that have certain custom field values or keywords to an escalation department.
- And more.

For additional details, including a sample application and documentation on implementation, download [this sample external provider](#) .

Options

Use this tab to enable external providers. For each external provider enabled, the corresponding tab will become active:

- Enable login provider - Checking this box will enable the login provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable custom field provider - Checking this box will enable the custom field provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable ticket provider - Checking this box will enable the ticket provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable live chat provider - Checking this box will enable the live chat provider and allow the

administrator to configure the settings on the corresponding external provider tab.

- Enable user information provider - Checking this box will enable the user information provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable events provider - Checking this box will enable the events provider and allow the administrator to configure the settings on the corresponding external provider tab.

Login

A login provider can be implemented that allows SmarterTrack to query existing systems for user login, authentication, and creation. Every time a user logs in or returns to the site with a login already stored in their cookies, this provider is called. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.
- Forgot Password URL - The URL used to recover password information for SmarterTrack users.
- Default Role for Users - To specify whether users are considered registered or anonymous after logging in, select the appropriate option from the list. Note: If users are considered anonymous, the administrator will have to manually grant the user role to new users. For this reason, it is recommended to select registered users as the default role.
- Mark email addresses as verified - Checking this box will automatically verify that email addresses for users are valid.
- Enable single sign-on cookies from other sites - Checking this box will allow the Web service to accept session cookies from another site.

Custom Field

A custom field provider can be implemented to allow a custom set of fields to be displayed when creating tickets and live chats. The custom field provider is called when a ticket or live chat is first created and allows the administrator to add or pre-fill fields based on the user's login credentials or other information. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Ticket

Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Live Chat

Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

User Information

The user information provider can be implemented to automatically pull information from an external database and display the information in the Communication tab of tickets. A business can use this provider to display important customer information (recent purchases, licensing information, number of past tickets, etc.) so that agents have all available details when viewing tickets. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Events

An events provider can be implemented to automatically update third-party software and databases when agents perform specific actions. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the Web service.
- Web Service Password - The password used to authenticate the Web service.

Log Settings

SmarterTrack creates log files containing information about license activations, SMTP connections, POP connections and errors on a daily basis. The Log Settings section gives administrators the ability to view and manage these log files.

To access this section, click the settings icon . Then expand System Settings then expand Setup and

click Log Settings in the navigation pane. The log settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- **Delete Log Files After** - The number of days after which the log files are deleted. Deleting log files on a regular basis will minimize the amount of disk space that SmarterTrack uses. By default, log files are deleted after 14 days.
- **Enabled** - Checking this box will delete log files after the specified number of days. By default, this setting is enabled.
- **Enable short query logging** - Checking this box will allow SmarterTrack to keep a short log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- **Enable full query logging** - Checking this box will allow SmarterTrack to keep a very detailed log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- **Enable lock tracing** - Checking this box will allow SmarterTrack to keep a detailed log about objects being cached in server memory. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.
- **Enable cache tracing** - Checking this box will track all system level locks to identify points of conflict in the software. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by SmarterTools support.

View

Use this tab to view or delete log files. The following columns are available:

- **Checkbox** - Use these boxes to select multiple log files. Log files must be selected before choosing an action from the toolbar.
- **File Name** - The name of the log file.
- **Date** - The date the log file was created.
- **Size** - The size of the log file.

To view a specific log file, simply double-click the file and it will load in a pop-up window. To delete a log file, select the log file(s) to delete and click the Delete button in the content pane toolbar. A

number will appear on the View tab that displays the total number of log files that are available to view.

Setup

Database Settings

Use this section to configure the SmarterTrack installation to connect to an existing database. These settings are configured while running the InstallShield Wizard during the installation process, but can be modified by the database administrator at any time. For example, if the SmarterTrack database is moved from one server to another, these settings should be changed on this page to reflect the move and reconnect to the database.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Database Settings in the navigation pane. The database settings will load in the content pane and the following fields will be available:

- Server Type - To specify the type of server, select the appropriate option from the list.
- Server Name - The name of the server on which the database is stored.
- Authentication - To specify the authentication method, select the appropriate option from the list.
- Domain Name - When using Windows authentication, the domain name used to authenticate with the database.
- Username - The identifier used to authenticate with the database.
- Password - The corresponding password used to authenticate with the database.
- Database Name - The name of the database.
- Table Name Prefix - The text that prefixes each database table created for SmarterTrack. Note: SmarterTools recommends leaving the table name prefix as the default value.

The following options are available in the content pane toolbar:

- Save - Saves the database settings.
- Test - Verifies that the database connection settings are valid.

Clustering

This feature is only available to administrators using SmarterTrack Enterprise with Failover Functionality or SmarterTrack Enterprise with Load Balancing Functionality.

Administrators can prevent costly downtime by installing a second server that is always connected to

the SmarterTrack database in standby mode. In the event that the primary server fails, the secondary server will operate as a backup so your help desk remains online.

To view the failover settings, click the settings icon . Then expand the System Settings and Setup folders and click Clustering in the navigation pane. The failover servers will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple servers. Servers must be selected before choosing an action from the toolbar.
- **Server Name** - The computer name of the server the license key was activated on.
- **File Path** - The locations of the app_data folder in which the configuration file is stored.
- **Last Heartbeat** - The date and time the SmarterTrack database last communicated to the server.
- **Processes** - The number of times the license key has been installed on the server.
- **Status** - The status of the server.
- **Primary** - The default server that SmarterTrack uses.
- **Disabled** - The server is not set up to operate as a backup in the event the primary server fails.
- **Active** - The server actively communicating with the SmarterTrack database.
- **Passive** - The server that will act as a backup in the event the primary server fails.
- **Unavailable** - The server is not communicating with the SmarterTrack database.
- **Mode** - The edition of the SmarterTrack installation on the server.

The following options are available in the content pane toolbar:

- **Enable** - Allows the selected server to operate as a backup in the event the primary server fails.
- **Disable** - Prevents the selected server to operate as a backup in the event the primary server fails.
- **Set Active** - Changes the status of the selected server to active.
- **Delete** - Permanently deletes the selected server(s) as a potential failover server.
- **Refresh** - Refreshes the content pane.

Optimization

Administrators will use this section to fine-tune the performance of SmarterTrack. By default, SmarterTrack is set to run optimally on the majority of systems, regardless of how busy the help desk is. However, there may come times when system administrators want to manage these settings and customize the performance of SmarterTrack. Note: These are advanced settings and it is not recommended to change them without understanding the impact of the changes.

To access this section, click the settings icon . Then expand the System Settings and Setup folders and click Optimization in the navigation pane. The optimization settings will load in the content pane and the following tabs will be available:

Options

- **Heartbeat Interval** - The amount of time between communication attempts to the server to refresh tree view counts, reminder popups and counts, live chat popups, and other automatic functions. By default, this option is set to 10 seconds.
- **Portal Chat Link Interval** - The amount of time between communication attempts to the server to detect whether live chat is online or offline when displaying the chat online/offline image. By default, this option is set to 20 seconds.
- **Enable** - Select this checkbox to enable the portal chat link interval. Note: If this options is disabled, portal visitors will have to manually refresh the page to determine if live chat is currently offline or online.
- **Live Chat Interval** - The amount of time between communication attempts to the server to refresh live chat messages. By default, this option is set to 2 seconds.
- **Who's On Interval** - The amount of time between communication attempts to the server to refresh visitor information displayed in Who's On. By default, this option is set to 8 seconds.

Threads

Use this tab to start and stop background threads. Changing the status of background threads may disable certain areas of the application and will affect functionality. For this reason, it is not recommended to change the status of background threads unless instructed to do so by the SmarterTools Support Department for debugging purposes. A number appears in the tab itself to show the total number of threads available to manage.

Business Hours

Administrators will use this section to specify the organization's business hours and holidays. Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see General Settings .

To access this section, click the settings icon . Then expand System Settings and then Setup and click Business Hours from the navigation pane. The business hour settings will load in the content pane and the following tabs will be available. Each tab will have number to display the total number of days and/or holidays available to manage.

Business Days

Use this tab to specify the days and times the organization operates. To edit a day, select the desired day and click Edit in the content pane toolbar.

To remove a day from your business hours, simply select the day of the week and click Edit . When editing the day, delete the start and end times and save your changes. This will unselect that day and remove it from the brand's available business hours.

Holidays

Use this tab to specify company holidays. To add a holiday, click Add Holiday in the content pane toolbar. Note: Live chat will automatically be disabled (offline) on holidays.

Master Categories

Configured by the system administrator, master categories are available on time logs and tasks to help managers see where an agent's time is spent or to organize tasks related to a specific project.

To access this section, click the settings icon . Then expand System Settings and then Setup and click Master Categories from the navigation pane. Any existing master categories will load in the content pane.

Adding New Master Categories

Creating new master categories is very simple, just click New in the content pane toolbar and a Category modal window pops up. Type in the new master category name and click OK to save it. Once created, master categories are available to use immediately.

Surveys Overview

This feature is only available to administrators using SmarterTrack Enterprise.

SmarterTrack's survey feature allows companies to solicit customer feedback that will give managers a better perspective into customer satisfaction and loyalty. Obtaining customer feedback in a timely and useable format helps to ensure that the company is meeting and exceeding customer expectations and gives insight into key changes that should be made to improve the overall success of the company.

To view or manage surveys in the system, click the settings icon . Then expand System Settings and Setup and click Surveys in the navigation pane. A list of surveys will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple surveys. Surveys must be selected before choosing an action from a toolbar.
- **Name** - The name of the survey.
- **Surveys Offered** - The number of times the survey has been offered to customers.
- **Surveys Answered** - The number of times customers completed the survey.

Keeping track of the number of surveys completed versus the number offered can give insight into how successful a particular survey is received. If a low percentage of surveys are answered, it may be worthwhile to revisit the survey and make adjustments to try and gain a higher percentage of responses.

In general, the following options are available from the content pane toolbar:

- **New** - Creates a new survey.
- **Delete** - Permanently deletes the selected surveys and any associated survey results.

Viewing Surveys

To view a survey, simply click a survey and it will display in the preview pane. If you would rather view the survey in a popup window, double-click the survey instead. Note: Double-clicking a survey also enables you to edit the survey.

In general, the following options are available from the preview pane toolbar:

- **Edit** - Edits the survey contents.
- **Delete** - Permanently deletes the selected survey and any associated survey results.

Creating New Surveys

To create a new survey, click **New** in the content pane toolbar. This will open the survey editor, which the agent will use to create the new survey. For step-by-step instructions on how to create a survey, see the KB article [How To Create a Survey . Options Tab](#)

This tab allows the agent to specify basic information regarding the survey. The available options are:

- **Survey Name** - Type the name of the survey in this field.
- **Header Text** - Type survey instructions or welcome message in this field. The text will appear at the top of the survey.
- **Thank You Text** - Type a closing message in this field. This customer will see this text after successfully submitting the survey.

This tab allows agents to create, edit, or modify the order of survey questions. If the agent is editing a survey, a list of the current questions will load in the content pane.

In general, the following columns are available to the agent:

- **Checkbox** - Use these boxes to select multiple questions. Questions must be selected before choosing an action from the actions toolbar.
- **Move** - Use these arrows to modify the order of survey questions.
- **Question** - The question text.
- **Question Type** - Options include short answer, long answer, single selection, multiple selection, yes/no, and rating.
- **Weight** - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

The following options are available from the survey editor toolbar:

- **Save** - Saves the survey.
- **Add Question** - Adds a new question to the survey.
- **Edit** - Edits the selected question.
- **Delete** - Permanently deletes the selected question(s).

Email Settings

Administrators will use this section to specify the email settings SmarterTrack will use to send messages and error notifications from the system. Note: These settings are separate from Department and Groups SMTP settings and only affect system error notifications.

To access this section, click the settings icon . Then expand System Settings and Setup and click Email Settings in the navigation pane. The email settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following setting:

- **Delivery Delay** - To specify the number of seconds automated messages from the system are delayed, type the appropriate number in this field. By default, the delivery delay is 10 seconds. Setting a delivery delay can keep the connection between your help desk and your mail server running smoothly.
- **Addresses to Exclude** - Any email address you add to this text box will be excluded from receiving any departmental auto-responders (e.g., ticket received notifications).

Error Notifications

Use this tab to specify the following error notification settings:

- **Reporting Level** - To specify how error notifications are recorded, select the appropriate option from the list.
- **Email Address** - Error notifications are both sent from this address and sent to this address.
- **SMTP Server** - The outgoing SMTP server name.
- **SMTP Server Port** - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25.
- **Enable secure sockets layer (SSL)** - Check this box if the connection to the SMTP server must be SSL.
- **Enable SMTP authentication** - Check this box if SMTP authentication is required to send mail from this email address.
- **Auth Username** - The identifier used to authenticate with the SMTP server.
- **New Password** - The corresponding password used to authenticate with the SMTP server.
- **Confirm Password** - Retype the corresponding password used to authenticate with the SMTP server.

To test the SMTP connection, click Test SMTP in the content pane toolbar. If the settings are invalid, the test will return an error message and the SMTP settings will need to be adjusted.

Email Templates

When certain actions occur within the system, SmarterTrack can send an email based on that action. For example, if a company wants to send a follow-up survey to a customer after a Ticket resolution, the system will automatically send an email requesting the customer complete the survey. These system-generated emails are predefined and no new templates can be created. However, administrators can use this section to edit the template content.

To access this section, click the settings icon . Then expand System Settings and Setup and click Email Templates in the navigation pane. A list of email templates will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple templates. Email templates must be selected before choosing an action from the toolbar.
- **Template Name** - The name of the email template.
- **Description** - A short summary describing the purpose of the template.

The following option is available from the content pane toolbar:

- Edit - Allows the administrator to edit the subject line and text of an email template.
- Refresh - Refreshes the content pane.

Template Types

There are eight different templates for system emails: Auto-Close Ticket, Email Rejected Due to Lock, Email Rejected Due to New Ticket Requirements, Email Rejected Due to Policy, Forgot Login, Survey, Ticket List, and Verify Email Address.

Auto-Close Ticket

This email is used when a department is set to automatically close tickets after a certain amount of time. The email notifies the customer that a particular ticket was closed, but that the ticket can be re-opened by simply replying to it. The following variables are available:

- The Subject of the closed ticket [%Subject%]
- The ticket number of the closed ticket [%TicketNumber%]

Email Rejected Due to Lock

This template is used to notify a customer that the ticket they are replying to has been closed and locked and offers a way to initiate a new ticket. The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Email Rejected Due to New Ticket Requirements

This template is used to notify a customer that they don't meet the department's required role for starting a ticket. For example, a billing department may require users to be Registered Users of SmarterTrack, but they are attempting to submit the ticket anonymously. For more information, see SmarterTrack Roles . The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Email Rejected Due to Policy

This template is used to notify a customer that the department they're trying to contact does not accept tickets via email. This email will be sent when "Allow new tickets to be submitted" is not checked in a

department's POP settings. Instead, tickets need to be created via the Web portal. For more information, see [Departments](#) . The following variables are available:

- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]
- The email address of the original sender [%EMAIL%]
- The subject of the email that came in [%SUBJECT%]

Forgot Login

This template is used to send the password to the registered email account on file when a user forgets his/her login information and they click on the "Fogot Login?" link on the Web portal. The following variables are available:

- Company name as defined in brand settings [%COMPANY%]
- The base URL of the support site [%SITEURL%]
- The password of the account (required) [%PASSWORD%]
- The username of the account [%USERNAME%]

Survey

This template is used to offer a survey to a customer after their ticket is resolved. The following variable is available:

- The customer name [%CustomerName%]
- The username for the customer [%CustomerUsername%]
- The subject of the resolved ticket [%Subject%]
- The survey URL [%SurveyUrl%]
- The ticket number [%TicketNumber%]

Ticket List

This template is used when a customer requests an emailed list of all previous tickets. The following variable is available:

- All Tickets that belong to user [%TicketList%]

Verify Email Address

This template is used to confirm a new user's email address. The following variables are available:

- The brand name for the help desk they are registering for [%BrandName%]
- The current date (on the server) [%DATE%]
- The current time (on the server) [%TIME%]

- The email address on the account [%EMAIL%]
- The full name for the user signing up [%FullName%]
- The link they need to click on to verify the account (Required) [%LINK%]
- The username on the account [%USERNAME%]

VoIP Accounts

This feature is only available to administrators using SmarterTrack Enterprise and the SmarterTrack Communicator add-on.

Administrators are able to add VoIP accounts directly into SmarterTrack, which means that all settings, profiles and agent information can be pushed to any desktop or laptop an agent logs into. This greatly increases an agent's flexibility and also limits the amount of management and administration needed. VoIP accounts are only compatible with SmarterTrack Communicator.

To view or manage VoIP accounts in the system, click the settings icon . Then expand System Settings and Setup and click VoIP Accounts in the navigation pane. A list of accounts will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple surveys. Surveys must be selected before choosing an action from a toolbar.
- Agent - The name of the agent.
- Group - The group the agent is assigned to.
- Phone Number - The phone number associated with the agent.

In general, the following options are available from the content pane toolbar:

- New - Creates a new VoIP account.
- Edit - Click this button and select the appropriate account to edit.
- Delete - Permanently deletes the selected account.

Creating a New VoIP Account

To create a new VoIP account, click New in the content pane toolbar. This will open the VoIP account editor, which can be used to create the new account. Options Tab

This tab allows the administrator to specify basic information regarding the account. The available options are:

- Agent - The agent the VoIP account is being created for.
- Group - The group the agent belongs to.

- Country Code - The country code associated with the phone number.
- Phone Number - The agent's phone number. A direct line is not required.
- Extension - The agent's extension.
- Max Phone Lines - The maximum number of phone lines the agent will have available.
- Min Call Log Length - The minimum amount of time a call needs to last before a call log is automatically created. SIP Tab

As SmarterTrack Communicator is a SIP-compliant softphone, a phone server's SIP information is required for each VoIP account that is created. In most cases, this information can be taken directly from the phone server itself.

- VOIP Username - The agent's VoIP username as it appears in the phone server.
- VOIP Password - The agent's password as it appears in the phone server.
- SIP Server - The phone server's SIP address (e.g., sip.ringcentral.com).
- SIP Port - The listening port used for SIP. The default is 5060.
- SIP Domain - The full domain for the SIP phone server (e.g., sip.ringcentral.com:5090)
- SIP Auth Name - The username the phone server assigns to the agent.
- Outbound Proxy Server - The address of the outbound proxy server, if one is being used.
- Outbound Proxy Port - The port used by the outbound proxy server.
- Use Session Description Protocol (SDP) - Check this box in order for the phone server to pass session information to SmarterTrack Communicator. For example, session announcements or session invitations. STUN Tab

Simple Traversal of UDP through NATs (STUN) is a protocol for assisting phone servers that are behind NAT firewalls and/or routers.

- STUN Server - The STUN server's address (e.g., stun.ringcentral.com).
- STUN Port - The STUN server's port. The default is 3478.

Organization

Brands

A brand is the top level of the SmarterTrack help desk. For smaller companies, the brand is just another name for the company itself, and there will be just one brand in SmarterTrack. However, companies with different divisions may want to use SmarterTrack to manage all company communications, separately, for all divisions. In addition, some companies have different brands that specialize in specific products and/or clientele. SmarterTrack can accommodate either scenario by allowing companies to set up separate brands without having to install multiple different instances of

SmarterTrack. In addition, agents can work with customers in each brand separately, and customers of each brand can access customized and brand-specific Web portals.

Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface. Departments can also be assigned to support specific brands.

To access this section, click the settings icon . Then expand System Settings and Organization and click Brands in the navigation pane. Any brands associated to your company will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple brands. Brands must be selected before choosing an action from the toolbar.
- **Brand Name** - The name of the brand.
- **Host Header** - The host header to which a brand is assigned.

The following options are available from the content pane toolbar:

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

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

Options

Use this tab to edit the following settings:

- **Brand Name** - The name of the brand.
- **Brand Website** - The URL to the primary website for the brand.
- **Portal Tab Text** - The text that appears on the first portal tab. By default, this says "Portal" but it can be modified to say whatever you like.
- **Brand Logo** - The logo to use for the brand.
- **Display logo on portal** - Checking this box will display the company logo on the main portal page.
- **Host Headers** - Host headers allow a Web server to host more than one Web site domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For more information, see the KB article [How To Create Host Headers for Use with Brands](#) . Note: Host headers cannot be edited after the brand is created.

Colors

Use this tab to modify the default color schemes for various parts of the SmarterTrack management interface for this particular brand. The color options are:

- **Primary Color:** - This is the background color for the title bars as well as the number badges that denote the number of items across the management interface. (E.g., the number of tickets). The default is #055E8A.
- **Secondary Color:** - This is the background color for the button bar in the content and navigation panes. (E.g., New, Actions). The default is #222222.
- **Link Color:** - This is the color for any links, headers and numeric indicators that appear in the content and navigation panes. (E.g, column headers). The default is #0088CC.

Announcement

Use this tab to display an announcement on the portal home page. For example, some companies may choose to write a welcome message or a description of the types of services customers might find on the self-service portal. The announcement will appear at the very top of the main content area of the portal.

SMTP

As SmarterTrack does not utilize an internal SMTP server to send emails messages, use this tab to edit mail settings for brand-level notifications. For example, any system emails in any Email Templates .

- **From Address** - The email address from which brand messages are sent.
- **From Display Name** - The name used to identify the mail server. This field is optional.
- **SMTP Server** - The outgoing SMTP server name.
- **SMTP Security** - Select the level of security used for sending emails, either SSL, TLS or None.
- **SMTP Server Port** - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
- **Enable SMTP authentication** - Check this box if SMTP authentication is required to send mail from this email address.
- **Auth Username** - The identifier used to authenticate with the SMTP server.
- **Password** - The corresponding password used to authenticate with the SMTP server.
- **Confirm Password** - Retype the password used to authenticate with the SMTP server.

Who's On

Each host header has one or more related URLs -- the URL that the visitor sees in the browser's address bar when they are visiting a website. To ensure that visitors to the related URLs are tracked in Who's On, type the URLs in this field.

- Track portal visitors in Who's On - Checking this box will include portal visitors in the Who's On count.

Maps

Use this tab to specify the following map settings:

- Map Provider - Select which map provider SmarterTrack will use from the list. Microsoft Bing Maps is the default map provider.
- Enabled - Checking thos box will enable the map provider.
- Map URL - The default URL for the selected map provider.
- Provider Key - The API key provided by Google. For more information, see the KB article [How To Set Google Maps as the Map Provider for Live Chats and Who's On](#) .

Custom CSS

SmarterTrack allows administrators to stylize their brand portals and/or the management interface with fully customizable CSS. Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them.

To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can then create a version of that style yourself, and then paste it in the box to override the default. Realize this will happen wherever that style is used, so changing one style can affect both the portal and the management interface.

To revert back to the default style, simply remove your custom style from here and save your changes.

Departments

Brands are broken down into departments. Typically, each department will have its own email address, such as: support@example.com or sales@example.com. This section lists all of the departments that are currently available to your organization and provides administrators with the ability to add new departments and/or edit/delete existing departments.

To access this section, click the settings icon . Then expand the System Settings and Organization

folders and click Departments in the navigation pane Any departments associated to your company will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- **Department Name** - The name of the department. For example, sales, support, billing, etc.
- **Email Importing** - The POP username being used to import tickets into SmarterTrack for the department.
- **Agents** - The number of agents assigned to the department.
- **Active Tickets** - The number of active tickets within the department.
- **Active Live Chats** - The number of active live chats within the department.

The following options are available from the content pane toolbar:

- **New** - Creates a new department.
- **Edit** - Allows the administrator to make changes to a department's settings.
- **Clone** - Rather than creating a department from scratch, administrators can clone an existing department and modify settings as needed.
- **Delete** - Permanently deletes the selected department(s).

To view the settings for a specific department, simply double-click the department. Alternatively, you can select a department and click the Edit button. The department settings will load in the content pane and the following tabs will be available:

Options

- **Department Name** - The name of the department.
- **Brand Name** - The brand to associate to the department.
- **Front Line Group** - The default group that gets assigned tickets and live chats.
- **Language** - The default language for the department.
- **Enable live chat** - Checking this box will allow customers to initiate live chats with members of this department.
- **Enable ticket importing from POP** - Checking this box allows customers to submit tickets to the department by email. If this option remains unchecked then customers can only submit tickets via the customer portal. Note: The administrator must also check "Allow new tickets to be submitted through POP" in the POP tab to allow customers to submit new tickets by email.
- **Enable auto-responder** - Checking this box will send system emails to the customer. For more information, see Email Templates .

Tickets

- Portal Submission Requires - The role required to submit a ticket via the porta. For more information, see Roles .
- Ticket Template - The custom field template used to submit tickets. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Templates .
- Survey to Offer - To automatically offer a survey to customers after a ticket is closed, select the appropriate survey from the list. For more information, see Surveys .
- Auto-Close After - The number of hours after which a ticket assigned to the department and marked as "waiting" will automatically close. The default setting is 168 hours.
- Enabled - Checking this box will enable the auto-close setting. By default, this setting is disabled.
- Auto-Lock After - The number of hours after which tickets assigned to the department and marked as "closed" will automatically lock. (Locked tickets do not automatically re-opened when a customer sends a reply.) The default setting is 322 hours.
- Enabled - Checking this box will enable the auto-close setting. By default, this setting is disabled.
- Auto-Delete After - The number of days after which tickets assigned to the department with a "closed" or "closed and locked" status will automatically be deleted. The default setting is 365 days.
- Enabled - Checking this box will enable the auto-delete setting. By default, this setting is disabled.
- Enable tickets to be started in the portal - Checking this box will allow customers to submit new tickets from the portal. By default, this setting is enabled.
- Enable automatic search of knowledge base articles when submitting a new ticket - Checking this means that when customers submit tickets to the department via the Web portal, prior to the ticket actually being submitted the end user will be presented with a screen listing possible KB articles that are relevant to their questions. By default, this setting is enabled.
- Require verified email address to start tickets - Checking this box will only allow users with verified emails to submit tickets via the Web portal.
- Send notification to customer when tickets are auto-closed - Checking this box sends an email notification to the customer when a ticket is auto-closed. For more information, see Email Templates .
- Include tickets with resolutions in auto-delete - Checking this box will automatically delete all tickets after the designated period, even if they have resolutions tied to them. Ticket resolutions

are included in SmarterTrack's indexing and available as options in Get Assistance for tickets. Therefore, it may be worthwhile to leave this setting disabled.

- Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before they are able to close it.
- Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.
- Custom Message Before Ticket Submission - The text that is displayed at the top of the ticket submission form in the Web portal.
- Custom Message After Ticket Submission - The text that is displayed after a ticket is successfully submitted from the Web portal.

Live Chat

- Live Chat Template - The custom field template used to submit live chats. The live chat template specifies which fields the user should complete when submitting a live chat. For more information, see [Templates](#) .
- Estimated Wait Time - The estimated number of seconds that a customer may need to wait to live chat with an agent. By default, the estimated wait time is set to 30 seconds.
- Survey To Offer - To automatically offer a survey to customers after a live chat, select the appropriate survey from the list. For more information, see [Surveys](#) . Surveys are displayed immediately after a chat ends.
- Enable chats to be started in the portal - Checking this box will allow customers to start live chats with agents from the portal. By default, this setting is enabled.
- Enable automatic search of knowledge base articles when submitting a live chat - Checking this means that when customers initiate live chats to a department via the Web portal, prior to the chat actually being submitted, the end user will be presented with a screen listing possible KB articles that are relevant to their questions. By default, this setting is enabled.
- Custom Message Before Chat - The text that is displayed at the top live chat submission form.
- Welcome Message - The text that is displayed as the initial message from the agent to the end user. The welcome message appears above the user's initial live chat question.
- Custom Message After Chat - The text that is displayed after a live chat has ended.
- Estimated Wait Time Message - A message notifying customers of their estimated wait time to chat with an agent.

Call Logs

- Call Log Template - The custom field template used to create a call log. The call log template specifies which fields the agent should complete when logging a call. For more information, see [Templates](#) .

- Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.
- Enabled - Checking this box will enable the auto-delete setting. By default, this setting is disabled.
- Enabled - Checking this box will enable the auto-purge setting. By default, this setting is disabled.

SMTP

Use this tab to specify the following email settings for messages sent from the department:

- From Address - The email address from which department messages are sent.
- From Display Name - The nickname of the server. This field is optional.
- SMTP Server - The outgoing SMTP server name on which the email account resides.
- SMTP Security - Select the level of security used for sending emails, either SSL, TLS or None.
- SMTP Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
- Enable Secure Sockets Layer (SSL) - Check this box if the connection to the SMTP server must be SSL.
- Enable SMTP authentication - Check this box if SMTP authentication is required to send mail from this email address.
- Auth Username -The identifier used to authenticate with the SMTP server.
- Password - The corresponding password used to authenticate with the SMTP server.
- Confirm Password - Retype the password used to authenticate with the SMTP server.

POP

This tab is only available if the "Enable POP Ticket importing" option is enabled in the Options tab.

Note: If using a POP server for email, any messages in the account will be downloaded into SmarterTrack and deleted from the mail server.

- Server Name - The outgoing POP server name on which the email account resides.
- POP Security - Select the level of security used for receiving emails via POP3, either SSL, TLS or None.
- Server Port - The port used to connect to the POP server. By default, the POP server port is 110. Note: If SSL or TLS is used, this port will need to change to match the security setting.
- Login Username -The identifier used to log in to the POP server.

- Password - The corresponding password used to log in to the POP server.
- Confirm Password - Retype the password used to authenticate with the POP server.
- Import Frequency - The interval, in minutes, that SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.
- Allow new tickets to be submitted through email - Checking this box will allow customers to submit tickets to the department via email. Note: If "Enable ticket importing from POP" is enabled in the Options tab, but this checkbox remains unchecked, users submitting tickets via email will receive the "Email Rejected Due to Policy" email template rather than the standard department auto-responder. For more information, see Email Templates .
- Leave messages on server - By default, when you retrieve email through POP3, the emails are deleted from the mail server. Enabling this will leave email messages retrieved via POP to stay on the mail server.

Auto-Responder

This tab is only available if the "Enable auto-responder" option is enabled in the Options tab.

- Max KB Search Results - The maximum number of knowledge base article links included in the text of the auto-responder.
- KB Search Folder - The folders SmarterTrack will search in before creating the list of suggested articles.
- View Ticket Online Text - The anchor text of the link to view the ticket in the portal. By default, this link is included in the text of the auto-responder.
- Enabled - Checking this box will include a link allowing the customer to view the ticket in the portal in the text of the auto-responder. Note: If the variable [#VIEWTICKETONLINE#] is not included in the text of the auto-responder, this link will not be available.
- Browse KB Text - By default, the auto-responder displays a link to browse the knowledge base after the list of related articles. Administrators can specify the link text by typing the desired text in this field.

Note: SmarterTrack will only send a maximum of 3 responses to any single email address per 30 minute period. This is to keep SmarterTrack from accidentally spamming individual email addresses or possibly getting into looping issues with improperly configured vacation messages or other external auto-responders. SmarterTrack simply stops sending after sending 3 times. Messages do not sit in the outgoing spool and wait to be sent.

Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

To add new groups or edit existing group settings, click the settings icon . Then expand the System Settings and Organization folders and click Groups in the navigation pane. Any groups associated to your company will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- **Group Name** - The name of the group.
- **Department** - The department to which the group belongs.
- **Round Robin** - Whether tickets are distributed automatically via round robin distribution or if they're manually taken from the queue. For an explanation of the two distribution methods, see [Ticket Distribution Methods](#) .
- **Agents** - The number of agents assigned to the group.
- **Active Tickets** - The number of active tickets within the group.
- **Active Live Chats** - The number of active live chats within the group.

The following options are available in the content pane toolbar:

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

To view the settings for a specific group, simply double-click the group. Alternatively, you can select a group and click the Edit button. The group settings will load in the content pane and the following tabs will be available:

Options

- **Department** - The department to which the group belongs.
- **Group Name** - The name givent to the group.
- **VOIP Extension** - If there is an extension for the group as a whole, it should be entered here.
- **Allow agents to push pages to customers for live chats** - Checking this box will allow the agent to push links to relevant website pages to customers via live chat and Who's On. Note:

This option is only available to administrators. Agents must have Who's On enabled to push pages.

- Allow agents to send files to customers for live chats - Checking this box will allow agents to transfer files to customers via live chat.

Agents

This tab gives administrators the ability to add, edit, and delete agents from the group. To view or change the settings for a specific employee within the group, simply double-click the employee and the agent-group relationship settings will load in the content pane. The following options will be available:

- Agent - Select the agent to add to the group from this drop-down list.
- Round Robin - If round robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Round robin options include:
 - Not Included (Pull from Queue) - By selecting this option, the agent will not receive tickets automatically for the group via round robin. The agent will still be a member of the group, so they will be able to see tickets for the group, receive transfers, cherry pick tickets, etc. but they will not receive any tickets automatically. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
 - Primary Group - Agents in the primary assignment group will be the first to receive tickets via round robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
 - Secondary Group - Agents in the secondary group will receive round robin distributions only after the primary group has met their max ticket limit. Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.
- Max Tickets - The maximum number of new, active tickets an agent can have at a time. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.
- Auto-Logout - To specify the number of hours after which an inactive agent is automatically logged out of the SmarterTrack system, select the appropriate option from the list. By default, agents are automatically logged out after 30 minutes of inactivity.

- Enable ticket hand-off on auto-logout - Checking this box will automatically hand off any active Tickets for which the agent is responsible to another agent if the agent is automatically logged out due to inactivity. By default, this setting is disabled.
- Enable administrator alert on auto-logout - Checking this box will send a notification to the administrator if the agent is automatically logged out due to inactivity. By default, this setting is disabled.
- Enable agents to receive tickets and live chats automatically upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging in to the management interface. If unchecked, agents will need to manually set their active groups.
- Enable live chat - Checking this box will allow the agent to receive live chats for this group. By default, this setting is enabled.

Time Estimates

This tab gives administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports. For a very basic example, knowing that an agent will take an average of 10 minutes working on a new ticket tells you that an agent should be able to get through 6 tickets an hour. In an 8 hour shift, that means 48 tickets total. When coupled with agent cost, that number tells you what your support costs would be for that agent for that number of tickets. Managers and business owners can then use that information when making decisions on the types of support to offer (live chat, tickets or both), whether to offer paid or free support, whether to increase costs of goods and/or services to account for support costs, etc. In addition, these estimates can be used to project when a department and/or group is at the point where another agent or two is required in order to handle the workload.

- Ticket Created - The estimated number of minutes agents will spend creating a new ticket.
- Ticket Transferred - The estimated number of minutes agents will work on a ticket that has been transferred to them.
- Ticket Message In - The estimated number of minutes agents will spend working on a new ticket message.
- Ticket Message Out - The estimated number of minutes agents will spend researching and replying to a ticket message.
- Live Chat Started - The estimated number of minutes agents will spend starting a live chat.
- Live Chat Transferred - The estimated number of minutes agents will chat with a customer that has been transferred to them.
- Live Chat Incoming Message - The estimated number of minutes agents will spend responding to a live chat message.

- Live Chat Outgoing Message - The estimated number of minutes agents will spend composing a live chat message.

Employees and End Users

Just as the names imply, Employees, also known as agents, are employees of a company that are placed in various groups within various departments and handle customer issues using SmarterTrack. End users, also known as customers, are people who use SmarterTrack to submit the issues, questions and comments that agents work on.

To add new employees or edit existing employee settings, click the settings icon . Then expand System Settings and Organization and click Employees in the navigation pane. A list of all the employees in the system will load in the content pane.

To add new end users or edit existing end user settings, click the settings icon . Then expand System Settings and Organization and click Users in the navigation pane. Alternately, end users can be added using SmarterTrack's extensive web services and/or when SmarterTrack is integrated with a third-party application like a control pane, account management system or more. A list of all the end users in the system will load in the content pane.

By default, the following columns are available:

- Checkbox - Use these boxes to select multiple employees/users. Employees/users must be selected before choosing an action from the toolbar.
- User - The username the employee/end user uses to login to SmarterTrack.
- Email Address - The employee's/end user's email address.
- Role - Indicates whether the account is assigned an end user, administrator or agent role. For more information, see Role .
- Verified Email - A yes/no indication of whether the user's email address has been verified.
- Last Login - The date on which the employee/end user last logged in to SmarterTrack.

The following options are available from the actions toolbar:

- New - Creates a new employee/user.
- Edit - Allows the administrator to make changes to an employee's/end user's settings.
- Clone - Rather than creating a new user or agent from scratch, administrators can clone an existing user or agent and modify settings as needed.
- Delete - Permanently deletes the selected employee(s)/end user(s).

To view the settings for a specific employee/end user, simply double-click the employee/end user. The employee/end user settings will load in the content window and the following tabs will be available:

Options

The following options are available:

- Username - The username used to login to SmarterTrack.
- Authentication - The method used to login to SmarterTrack. The administrator can choose to allow employees to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
- Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
- New Password - To change the login password, type a new password in this field. Note: This option is only available if the authentication method is password.
- Confirm Password - To verify the new password, re-type it in this field.
- Email Address - The employee's/end user's email address.
- Display Name - The name used to identify the employee/end user within the SmarterTrack system.
- Time Zone - To specify the time zone, select the appropriate time zone from the list.
- Avatar - The display picture the agent uses when interacting with customers via Live Chat.
- New Image - To change the avatar, click Browse and select the appropriate file.

Roles

This tab displays the roles assigned to the employee/user. An employee's/user's permissions are defined by the roles to which he/she is assigned. For more information on roles, see Roles .

Web Interface

The following options are available:

- Spell-Check Dictionary - Agents and users have the ability to select the default spell-check dictionary to use for tickets and live chats. By default, SmarterTrack includes dictionaries for over 15 different languages.
- Enable automatic reminder popup - Checking this box will allow the agent to receive new reminders in a pop-up window. By default, this option is enabled.

Tickets

The following options are available:

- Forward To - To specify an alternate email to which tickets are forwarded, type the email address in this field.

- Enabled - Checking this box will allow the agent to forward tickets to an alternate email.
- Allow Replies From - To specify an alternate email address to use when replying to tickets, type the email address in this field.
- Display waiting ticket counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that are waiting for a customer response. By default, this option is enabled.
- Display ticket follow-up counters in left tree - Checking this box will display the total number of tickets for which the agent is responsible that is marked as needing a follow-up. By default, this option is enabled.
- Include waiting tickets in root tree item counts - Checking this box will include tickets that are waiting for a customer response toward the total number of tickets for which an agent is responsible. By default, this option is disabled.
- Include tickets scheduled for follow-up in root tree item counts - Checking this box will include tickets that are marked as needing a follow-up toward the total number of tickets for which an agent is responsible. By default, this option is disabled.

Live Chat

The following options are available:

- Agent Alias - There are times when agents and/or users may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace their real name when they participate in live chats.
- Max Active Live Chats - To change the number of live chats that can be participated in at a time, type the appropriate number in this field. By default, this option is set to 1.
- Enable automatic live chat popup - Checking this box will display new live chats in a popup window. By default, this option is enabled.
- Enable live chat notification sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
- Enable live chat in queue notification sound - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
- Block live chats while composing call logs - For agents only, checking this box will block live chats from popping up while an active agent is composing a call log.

VOIP

Use this tab to add up to four separate phone numbers for individual agents. For users, this will be their primary phone number.

Reporting

Use this tab to specify the following settings for reporting purposes:

- **Hourly Cost** - The hourly cost for the employee to work with tickets and live chats. This field is used for cost analysis reporting and is set to 10.00 by default. Note: This option is only available to administrators.

Custom Fields

This tab displays the available custom fields for user preferences. For more information on custom fields, see [Field Definitions](#) .

Roles

Every SmarterTrack user (here, the term "user" denotes anyone using SmarterTrack, from an end user to an administrator) is assigned a role, which defines permissions and dictates which features the user has access to. In addition, a user's ability to work within SmarterTrack is dictated by the combination of roles that are assigned to the user. Therefore, if a custom user role is created, the permissions assigned to all roles assigned to the user may need to be modified to ensure that the custom role's permissions are actually enforced. This is especially true of the Everyone and Agent roles as the Everyone role applies to everyone that interacts with SmarterTrack, both agents and end users, and the Agent role as it is necessary for any employee that is going to interact with end users and customers. By default, SmarterTrack has six predefined roles:

- **Everyone** - Typically a customer or portal visitor. The Everyone role can view and search Knowledge Base articles, rate KB articles and view news items. The Everyone role is assigned to every user within SmarterTrack and cannot be removed.
- **Agent** - Typically, an employee that has access to the management interface and that will interact with customers and end users. An agent is able to view and respond to their own tickets and live chats; create their own call logs and follow-up tasks; manage knowledge base articles, news items, and canned replies; use agent chat rooms and agent instant messenger; and view Who's On. It's worth noting that employees with the Agent role can only interact with their own items - they do not have access to other agent's tickets, live chats, etc. In addition, agents are only able to receive tickets for groups that they are members of.
- **Manager** - Generally an employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view all tickets and live chats, for all agents, for the groups that the manager participates in as well as for any departments those groups are associated with. Just as with an agent, a manager must be a part of a group before they can view all tickets and live chats for all other agents in that group. Note: Managers

must also have the agent role enabled.

- **Administrator** - An administrator that has access to the system settings, management interface and database information. Typically, an administrator can also manage departments, groups, and users. Note: For new installations, the administrator must also have the agent role enabled. For those upgrading from a previous version, the administrator will not have the agent role enabled and can only access the reports and settings areas of the management interface. Administrators must have the Agent role and be part of groups in order to view global tickets and live chats.
- **Registered User** - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items.
- **Registered User with Verified Email** - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items.

To access this section, click the settings icon . Then expand System Settings and Organization and click Roles in the navigation pane. A list of roles will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple templates. Email templates must be selected before choosing an action from the actions toolbar.
- **Role** - The name of the role.
- **Role Type** - Indicates whether the role relates to company employees or customers (end users).
- **Users** - The number of SmarterTrack users assigned to the role.
- **Custom Role** - Indicates whether the role is one of the seven predefined roles or if it was created by the administrator to meet specific company needs.

The following options are available from the content pane toolbar:

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

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

Options

Use this tab to specify permissions for the role:

- Role Name - The name of the role.
- Role Type - To specify whether the role relates to company employees or end users, select the appropriate option from the list.
- KB Articles - To specify whether users assigned to this role can create, modify, or read Knowledge Base articles, select the appropriate option from the list.
- KB Comments - To specify whether users assigned to this role can create, modify, reply, delete or moderate knowledge base comments, select the appropriate option from the list.
- News - To specify whether users assigned to this role can create, modify, or read news items, select the appropriate option from the list.
- Tickets - To specify whether users assigned to this role can create or reply to Tickets, select the appropriate option from the list.
- Tasks - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Call Logs - To specify whether users assigned to this role can create, modify, or read tasks, select the appropriate option from the list.
- Who's On - To specify whether users assigned to this role can view Who's On visitors, select the appropriate option from the list.
- Reports - To specify whether users assigned to this role can create reports, select the appropriate option from the list.
- Distribution - To specify how much control an employee has over the distribution of his/her workload, select the appropriate option from the list.
- Events - To specify whether users assigned to this role can configure events, select the appropriate option from this list.

KB Articles

Use this tab to specify knowledge base permissions for this role. Note: This tab is only available if the administrator selects custom KB article permissions in the options tab. Knowledge base permissions cover the role's ability to:

- Create articles
- Modify articles
- Delete articles
- Review articles
- View articles
- Purge articles

As an aside, if multiple KB folders are available, permissions can be set and/or modified on a per folder basis.

KB Feedback

Use this tab to specify knowledge base commenting permissions for this role. Note: This tab is only available if the administrator selects custom KB comment permissions in the options tab. Knowledge base feedback permissions cover the role's ability to:

- View article feedback
- Report abusive feedback
- Create feedback
- Reply to feedback added to articles
- Edit personal feedback
- Delete personal feedback
- Delete any feedback made
- Moderate (approve/delete) feedback

News

Use this tab to specify news permissions for this role. Note: This tab is only available if the administrator selects custom news permissions in the options tab. News permissions cover the role's ability to:

- Create news items
- Modify news items
- Delete news items
- Review news items
- View news items

Tickets

Use this tab to specify ticket permissions for this role. Note: This tab is only available if the administrator selects custom ticket permissions in the options tab. The Ticket permission cover the role's ability to delete tickets. Managers who do NOT want agents to be able to delete tickets can limit that ability here.

Tasks

Use this tab to specify task permissions for this role. Note: This tab is only available if the administrator selects custom task permissions in the options tab. Task permissions cover the role's ability to:

- Create tasks
- Modify tasks

- Delete tasks
- View tasks
- Change the start and end dates for tasks

Call Logs

Use this tab to specify call log permissions for this role. Note: This tab is only available if the administrator selects custom call log permissions in the options tab. Call log permissions cover the role's ability to:

- Create call logs
- Modify call logs
- Delete call logs
- View call logs

Who's On

Use this tab to specify Who's On permissions for this role. Note: This tab is only available if the administrator selects custom Who's On permissions in the options tab. Who's On permissions cover the role's ability to view Who's On visitors and interact with them.

Reports

Use this tab to specify report permissions for this role. Note: This tab is only available if the administrator selects custom report permissions in the options tab. Report permissions give managers the ability to only grant access to specific reports for the role.

Distribution

Use this tab to specify distribution permissions for this role. Note: This tab is only available if the administrator selects custom distribution permissions in the options tab. Distribution permission cover the role's ability to:

- Transfer work items - limits the role's ability to transfer tickets, live chats, etc. to new groups only.
- Transfer work items to specific agents - allows the role to transfer tickets, live chats, etc. to both groups and individual agents within the group.
- View queue - limits the roles' ability to view any tickets and/or live chats that are assigned to the queue.
- Manage their status - Limiting this means an agent can NOT mark themselves as active or inactive in the various groups they're a part of. This would be managed by a user with a role that has this permission, such as a manager or senior agent, if this is restricted for the role.

Events

Use this tab to specify events permissions for this role. Note: This tab is only available if the administrator selects custom events permissions in the options tab. Events permission cover the role's ability to create events for use. If disabled, the agent will NOT have access to SmarterTrack's events system.

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.

Tickets

Ticket Settings

To access this section, click the settings icon . Then expand System Settings and Tickets and click Ticket Settings in the navigation pane. The ticket settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- View Ticket Requires - To specify which role is required to view tickets in the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket in Portal Requires - To specify which role is required to submit tickets from the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket From Email Requires - To specify which role is required to be able to submit tickets via email, select it from the list. By default, this setting is set to all users.
- Max Messages in Replies - The number of previous messages automatically included in the text of a ticket response. By default, ticket replies include the text of three previous messages. All replies to tickets are stored by SmarterTrack, but not all replies necessarily need to be included in each ticket response.
- Stop Idle Events After - Idle events run on tickets that sit, without activity, for a certain amount of time. However, idle events can tax SmarterTrack if there isn't an upper limit set that stops from firing after a certain amount of time, especially if more than one idle event set. Therefore, this sets the number of days after which idle waiting tickets no longer trigger event actions.
- Agent Transfer Selection To specify whether an agent can select a specific agent when transferring tickets, select the appropriate option from the list.
- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- Enable specific date selection for follow-ups - Checking this box will allow agents to specify the date a follow-up is due. If this option is disabled, the agent can only choose the number of days that can pass until the follow-up is due. By default, this option is enabled.
- Enable ticket idle time reset when call log is added - Checking this box will set a ticket's idle time to 0 when an agent adds a call log to the ticket, specifically affecting any idle events set on

those tickets. Tickets can go idle for any one of a number of reasons. For example, an agent replies to the ticket and is waiting for the user to reply. However, if that user calls in, a call log can be attached to the idle ticket, thereby resetting its idle time and keeping any idle events from firing until a later time. By default, this option is disabled.

- Enable transferring tickets to inactive agents - Checking this box will allow agents to transfer tickets to agents that are not actively receiving tickets. By default, this option is enabled.
- Enable transferring tickets to another instance - Checking this box will allow agents to transfer tickets to another SmarterTrack installation. This is useful for larger companies that have multiple geographic locations, each with its own SmarterTrack installation. By default, this option is disabled.
- Enable ticket response time report data to be calculated based on business hours - Checking this box will allow any response time reporting to use a department's business hours as the basis for calculations versus a full 24 hour period. That enables managers and administrators to get a better idea of how agents are performing during the business day.
- Display user comment on ticket - Agents can make comments about particular accounts or users that carry over to new tickets coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a ticket from that customer sees the comment and can act accordingly.
- Disable end users' ability to close tickets - Checking this box will remove an end user's ability to close tickets on their own. Instead, they can only be closed by an agent or manager. This ensures agents are aware that the issue is resolved satisfactorily.
- Enable duplicate email check when importing tickets - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.

Service Quality

Service quality settings are a good way to set up service levels for departments. For example, if tickets need to be replied to within a given amount of time, or if there is a limit set on how long a ticket remains open before it's resolved.

- Idle Warning After - The number of seconds an agent has not responded to a ticket. After this threshold has been reached, the agent will receive a warning notification.
- Idle Critical After - The number of seconds an agent has not responded to a ticket before the ticket becomes critical. After this threshold has been reached, the agent will receive a critical notification.
- Duration Warning After - The number of minutes, hours or days a ticket remains open before its duration sets off a warning.
- Duration Critical After - The number of minutes, hours or days a ticket remains open before its duration sets off a critical alert.

Portal

Use this tab to edit the following settings:

- Max Uploads for New Tickets - The maximum number of attachments that can be uploaded with a new ticket. By default, SmarterTrack limits new tickets to 3 attachments.
- Enable attachments when submitting tickets - Checking this box will allow users to attach files to a ticket submission. By default, this option is enabled. The types of files allowed to be uploaded are managed in General Settings .
- Enable CAPTCHA when submitting tickets - Checking this box will require users to submit a CAPTCHA before submitting a new ticket. By default, this option is disabled.
- Display tickets created through email to users in portal - Checking this box will allow customers to see the tickets they have submitted through email within the Web portal. If this option is disabled, customers will not be able to view tickets submitted by email in the portal. By default, this option is enabled.
- Display the option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.
- Department Selection Text - The text that displays in the portal that instructs the user to select a department when submitting a new ticket.

Email

Use this tab to edit the following settings:

- Default Encoding - To specify the encoding format, select the appropriate option from the list.
- Delete Failed Emails After - The number of days after which undelivered emails are deleted. By default, failed emails are deleted after 30 days. Note: Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder.
- Reply Line Prefix - The punctuation that appears at the beginning of each line of a quoted email in a ticket reply. By default, the reply line prefix is >. Note: This option applies to plain-text emails only.

Raw Content

Use this tab to edit the following settings:

- Purge After - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.
- Purge After - The maximum number of files that will be kept before the files are purged from the system. By default, the maximum number of files is 25,000. Note: SmarterTools recommends keeping this option at the default setting or lower.

- **Purge After** - The maximum amount of space available for raw content storage. If this amount of space is exceeded, the files are purged from the system. By default, the maximum amount of space is 10,000 MB.

Servers

If the administrator has enabled the ability to transfer tickets between SmarterTrack installations, this tab is used to specify which instances of SmarterTrack tickets can be transferred to/from. Note: Both installations must be running the same version of SmarterTrack in order for this feature to work properly.

Signatures

To ensure consistency among all departments and groups within the company, administrators can create custom signatures that agents will use on all ticket correspondence. Alternately, different signatures can be created for each group and/or each department, as the needs arise.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Signatures in the navigation pane. A list of signatures will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple signatures. Signatures must be selected before choosing an action from the toolbar.
- **Brand** - The brand to which the signature is assigned.
- **Department** - The department to which the signature is assigned.
- **Group** - The group to which the signature is assigned.

The following options are available from the content pane toolbar:

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

Creating and Editing Signatures

To create a new signature, simply click New from the content pane. A new signature window will load in a pop-up window and the following options will be available:

- **Brand** - To assign the signature to a specific brand, select it from the list.
- **Department** - To assign the signature to a specific department, select it from the list.
- **Group** - To assign the signature to a specific group, select it from the list.

When creating new signatures, the WYSIWIG editor can be used to set font types, set colors, add links and more. In addition, variables can be used to pull information from the system to customize the signature based upon how users, department, groups, etc. are set up. The following variables are available:

- Agent Avatar [#agentavatar#] - The avatar information for each employee.
- Current Brand [#companyname#] - The brand that the agent is part of.
- Department Name [#departmentname#] - The department the agent belongs to.
- Display Name [#userdisplayname#] - The "friendly" name of the agent.
- Email Address [#useremail] - The email address of the agent.
- Username [#username#] - The username assigned to the agent.

To view a specific signature, simply double-click the signature. The signature will load in a pop-up window and the same editing options are available as when a new signature is created.

Including Custom Images

Signatures can also include custom images, such as agent photos, icons and logos, apart from the agent avatar. To include a custom image, simply use the standard HTML tag and link to an image hosted on your own server or some other hosting service such as Picasa or Flickr. One thing to note: images should be sized and placed so that they do not interfere with the other pieces of an agent's signature.

Rebalance Rules

To ensure an even workload is assigned to agents, administrators can set rebalance rules. Rebalance rules allow the system to automatically redistribute tickets among the available agents based on the parameters set by the administrator. For example, a support department with two active agents may receive a high volume of tickets that are evenly among both agents. Later that day, a third agent may login and the rebalancing rule can be set to automatically redistribute any unanswered active tickets among all three agents at that time.

NOTE: Rebalance rules are NOT meant to be a way to redistribute tickets on an hourly basis. Instead, they are intended to run twice or three times a day. For example, rebalancing tickets during shift changes or for periodic redistribution if agents are taken out of the rotation. In addition, any tickets that have been viewed by agents either by opening the ticket in a new window or by previewing the ticket in the preview pane, and therefore "held" by those agents, as well as any pinned tickets, are NOT redistributed when the rebalance rules take effect.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Rebalance Rules in the navigation pane. A list of rebalance rule swill load in the content pane.

In general the following columns are available:

- **Checkbox** - Use these boxes to select multiple rules. Rebalance rules must be selected before choosing an action from the toolbar.
- **Group** - The group to which the rebalance rule applies.

The following options are available from the content pane toolbar:

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

To view a specific rebalance rule, simply double-click the rule. The rebalance rule will load in the content pane and the following options will be available:

- **Rule Name** - The name of the rebalance rule.
- **Group** - The group to which the rebalance rule applies.
- **Agents** - The agents to which the rebalance rule applies.
- **Hold After Compose** - The time frame after which a submitted ticket can be reassigned to another agent. By default, this option is set to 30 minutes.
- **Hold After Read** - The time frame after which a ticket that has been read can be reassigned to another agent. By default, this option is set to 10 minutes.
- **Hold After Assigned** - The time frame after which a ticket that has been assigned to an agent can be reassigned to another agent. By default, this option is set to 20 minutes.
- **Rebalance Pinned After** - The time frame after which pinned tickets can be reassigned to another agent. By default, this option is set to 2 hours.
- **Enabled** - Check this box to reassign pinned tickets to another agent. By default, this setting is disabled.
- **Execute on Interval** - The time frame after which the rebalancing rule will be applied to tickets in the system. By default, this option is set to 1 hour.
- **Enabled** - Check this box to reassign tickets at a specific interval.
- **Execute on Schedule** - The times at which the rebalancing rule is applied to tickets in the system. A maximum of three times per day can be scheduled.
- **Enabled** - Check this box to reassign tickets at a certain time each day.
- **Execute when an agent starts receiving tickets** - Check this box to reassign tickets when an agent logs in and actively accepts tickets for this group.
- **Execute when an agent stops receiving tickets** - Check this box to reassign tickets when an agent logs out of the system and/or stops receiving tickets for this group.

Quality Control

SmarterTrack's quality control feature provides a method to ensure agents provide the required level of service to customers by allowing managers to review ticket responses as the response is sent to the customer. A practical use for this feature is when it is combined with a structured training program for new agents. Managers can review a high percentage of responses by new agents to ensure that the new agent is replying to the entire issue rather than a select subset of issues, that the spelling and grammar used are up to company standards and more. Of course, quality control can just as easily be used as part of a company's regular quality control measures. More seasoned agents may not require the same oversight as trainees, but oversight can still be administered to ensure the highest levels of customer service possible.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Quality Control in the navigation pane. A list of agents for whose ticket responses are monitored will load in the content pane.

To view the quality control settings for a specific agent, simply double-click the agent. The following quality control settings will be available:

- Agent - The agent being monitored.
- Forward To - The email address to which an agent's ticket responses are forwarded.
- Frequency - The number of ticket replies copied to the manager(s). The number of copied replies is based on a ratio in which the formula is 1 ticket for every X replies where X is the number entered in this field. For example, if 5 is entered in the frequency field, 1 out of every 5 tickets will be copied to the manager.

Ticket Distribution Methods

There are two distribution methods for tickets: the default distribution and Round Robin distribution. Next, ticket distribution is set up at the group level, when adding agents to the Group Settings . Administrators select whether agents will participate in the distribution method, and whether they are part of the primary or secondary distribution group.

For information on setting distribution methods, refer to the KB article [How To Set Up the Ticket Distribution Method](#) .

Default Distribution

Also known as "cherry picking," under the default distribution method, all tickets are directed to the queue and agents must manually select the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. In addition, This model is used by

companies that want the absolute fastest response time and are not concerned that agents can see all available tickets. Because this relies on the agents to do their fair share (and not pick the easy tickets), proper agent training is essential for successful implementation of the cherry picking distribution method.

Administrators that choose this distribution method should note the following:

- When agents are added to a group, in order for them to cherry pick tickets, the agent's round robin option should be "Not Included (Pull from Queue)". This will add the agent to the group so that they can see tickets, take transfers and pull tickets from the group's queue, they just won't receive any new tickets automatically.
- New tickets are not assigned directly to agents. All tickets are directed to the queue and are grabbed by staff members. (Waiting and follow-up tickets are assigned as usual).
- It's recommended that managers or system administrators configure event notifications that alert agents and/or managers when tickets have been waiting in the queue too long.

Round Robin

If administrators want to have more control over how tickets are distributed and to whom, using a round robin distribution method by enabling assignment groups is the answer. For example, a company that has a sales team that works on commission may employ the basic round robin distribution method to ensure that all sales agents receive the same number of potential leads. Another example is a technical support group that consists of both veteran agents as well as new or "in training" agents. In this case, administrators would want to make sure the more senior agents receive more tickets than the newer agents, so when the group is set up and the agents are added, the more senior agents receive a high "max tickets" setting and are put in the primary round robin group whereas newer agents are given a lower max tickets number and added to the secondary group. In that way, the senior agents get all new tickets first, with the newer agents acting as the overflow.

Administrators that choose this distribution method should note the following:

- In order for the round robin distribution method to be used, at least one agent needs to have an assignment group, either primary or secondary.
- An agent is considered in receipt of a new ticket in the following cases. In each case, the ticket is counted against any Max Ticket settings for the agent:
 - An active ticket is created as an incoming or outgoing ticket and assigned directly or indirectly to him.
 - A ticket is transferred from a different user to him, and it's active.

- A new ticket is created through email or web services and is assigned to the agent.
- An existing ticket is replied to through email and it is assigned to the agent but it was assigned to someone different before.
- A ticket is created through web services and is set as active.
- Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to reset back to the count of open and active tickets for each agent. This prevents people that are on vacation from getting 20 tickets when their day starts, but still allows the system to deal with agents that come in a few minutes late.
- When adding agents to a group, it IS possible to exclude specific agents from the round robin distribution. For example, managers may want to be part of a group but not received any tickets. In this case, simply set the round robin distribution for the agent to "Not Included (excluded from round robin)" when the agent is added to the group, or edit the agent as needed.
- It IS possible for agents in the secondary round robin group to be the first to receive tickets. This will occur if agents in the secondary group log in before agents in the primary group. For this reason, it's advisable that primary group agents log in first OR that agents in the secondary group have a managed ticket load using max ticket settings.

A Note on Round Robin, Agent Workload and Assignment Groups

When adding agents to a group, it's possible to set the number of max new tickets that the agent can have open at any one time in addition to the assignment group that the agent belongs to. If you set Max Tickets for all agents, regardless of their assignment group, once the max tickets limit for all agents is reached, any tickets that come into the group will go into the queue will not distribute completely; the queue will only distribute as fast as the agents work. If it is important for the queue to be empty, you will want to avoid setting a Max Tickets limit for agents and NOT let them go inactive, again, regardless of their assignment group. Removing max ticket limits will provide the most balanced distribution across a 24 hour period. The Max Tickets setting represents how many NEW tickets are distributed and sitting in the agent's active list. That means that while follow-ups and waiting tickets that become active for an agent (e.g., a reply to a waiting ticket comes in) do not follow max ticket limit, they DO affect agents receiving new tickets. This is important because it allows new work to be evenly distributed but continues to let agents to manage their existing workload.

On the other hand, for new employees, agents-in-training or in circumstances where agents log out at the end of a shift or the end of the day, it may be worthwhile to add a max tickets limit while allowing all other agents in the group to grab the remaining workload.

Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on

rules set by the administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

Administrators that choose this distribution method should note the following:

- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see Rebalance Rules .

Live Chats

Live Chat Settings

To access this section, click the settings icon . Then expand System Settings and Live Chats and click Live Chat Settings in the navigation pane. The live chat settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- **Live Chat Requires** - To specify which role is required to use live chat, select it from the list. By default, this option is set to all users.
- **Hand Off If No Initial Response** - When a live chat comes in, but an agent doesn't respond for this amount of time, the chat will either be handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue.
- **Enable** - Check this box to automatically reassign live chat that do not receive an agent response.
- **Hand Off If No Follow-up Response** - If, in the middle of a chat, the agent doesn't reply to the end user within this amount of time, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. Note: An agent is considered to be inactive in a live chat if the agent has not transferred the live chat to another agent, typed in the live chat text box, or does not have the last response in the chat.
- **Enable** - Check this box to automatically reassign live chats to another agent if the original agent has not performed an action on the live chat.
- **Hand Off If Interface Closed** - If, in the middle of a chat, the agent closes the chat window, the chat is handed off to another agent (if Round Robin distribution is enabled) or the chat will go back to the queue. By default, this option is set to two minutes.

- **Enable** - Check this box to automatically reassign live chats to another agent if the original agent is away (or has closed the management interface).
- **Distribute chats via Round Robin** - Checking this box will specify whether SmarterTrack assigns chats to agents within this group automatically. For more information on the different methods, see Ticket Distribution Methods .
- **Enable agent name/alias on invitations** - Check this box to display the agent's alias on live chat invitations. By default, this option is disabled.
- **Enable files to be sent by users during live chat** - Check this box to allow users to send files to agents via live chat. By default, this option is disabled.
- **Display user comment on live chat** - Agents can make comments about an particular account or user that carry over to new chats coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a live chat from that customer sees the comment and can act accordingly.
- **Disable live chat outside of business hours** - Check this box to turn off the live chat feature outside of the business hours that were set up for the department. By default, this option is disabled. Note: Administrators will need to define the live chat hours on the Business Hours page in the Setup folder in System Settings.
- **Show live chat number at the beginning of a live chat** - Check this box to automatically display the live chat ID number at the beginning of each live chat session.
- **Department Selection Text** - The text that displays in the live chat submission form instructing customers to select the department they want to interact with.

Service Quality

Use this tab to specify the following settings:

- **In Queue Sound** - To specify the how often a sound notifies agents that live chats are in the queue, select the appropriate time interval from the list.
- **Idle Sound** - To specify the how often a sound notifies agents that they have an unanswered live chat, select the appropriate time interval from the list.
- **Idle Warning After** - The number of seconds an agent has not responded to a live chat message. After this threshold has been reached, the agent will receive a warning notification.
- **Idle Warning Sound** - To specify the how often a sound warns agents that they have an unanswered live chat, select the appropriate time interval from the list.
- **Idle Critical After** - The number of seconds an agent has not responded to a live chat message before the chat becomes critical. After this threshold has been reached, the agent will receive a critical notification.
- **Idle Critical Sound** - To specify the how often a sound notifies agents that an unanswered chat

has reached the critical idle threshold, select the appropriate time interval from the list.

- Duration Warning After - The number of seconds a chat lasts before its duration sets off a warning.
- Duration Critical After - The number of seconds a chat lasts before its duration sets off a critical alert.

Translations

SmarterTrack can automatically translate live chats 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.

Use this tab to edit the following translation settings:

- Auto Translation Method - Select which translation service to use from the list. 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 Automatically Translate Live Chats](#) .
- 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 Automatically Translate Live Chats](#) .

Live Chat Links

Use this section to add live chat links to the company website. To view a list of live chat links, click the settings icon . Then expand System Settings and Live Chats and click Live Chat Links in the navigation pane. A list of live chat 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 actions toolbar.
- ID - The image identifier that is used in the live chat link script.
- Title - The name of the live chat link.

The following options are available from the content pane toolbar:

- New - Allows you to create a new set of live chat link scripts.

Edit - Allows you to edit an existing live chat script.

Delete - Allows you to delete an existing live chat script.

Creating a New Live Chat Script

When creating a new live chat script, the following options are available from the content pane toolbar:

- Save - Creates a live chat link.
- Generate Script - Generates the script(s) that appear in the Live Chat Link Script section.
- Cancel - Cancels without saving any changes.

In addition, the live chat link settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Title - The name used to identify the live chat link you're generating. These can signify the brand you're creating the links for, the website the links will go on, or any other naming convention you choose.
- Refresh Rate - The number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available. By default, the refresh rate is 30 seconds.
- Enable for [Department Name] - If there are multiple departments created within SmarterTrack, it is possible to select which departments will be available for live chat when using the live chat script.

Live Chat Online

Use this tab to edit the following settings:

- Display As - Select how the live chat online notification will be displayed.
- Image Link - The image to be displayed when live chat is available. (I.e., there are agents available to chat, it is within business hours, etc.)
- Description - The text displayed when a customer's mouse pointer hovers over the live chat online image.
- Anchor Title - The text available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.
- Navigate URL - The website URL to which customers are directed if they click on the live chat online image.

- **CSS Class** - The cascading style sheet class used to format the image on the company website, if there is one available. This is an optional field.

Live Chat Offline

Use this tab to edit the following settings:

- **Display As** - Select how the live chat offline notification will be displayed.
- **Image Link** - The image to be displayed when live chat is unavailable.
- **Description** - The text displayed when a customer's mouse pointer hovers over the live chat offline image.
- **Anchor Title** - The text available to search engine spiders that describes the live chat offline link. Specifying the anchor title may improve SEO efforts.
- **Navigate URL** - The website URL to which customers are directed if they click on the live chat offline image.
- **Navigate Target** - The HTML code that specifies whether the URL opens in a new window or the current window. For example, `_blank` will indicate that the URL should open in a new window. This is an optional field and if left blank will open the URL in a new window by default.
- **CSS Class** - The cascading style sheet class used to format the image on the company website. This is an optional field.

Generating the Script

Once all of the tabs are filled out - options set, images in place and linked properly - it's time to actually generate your live chat scripts. To do so, click the Generate Script button in the content pane toolbar. You will be presented with the following options:

- **Host Header** - In those instances where customers are utilizing multiple brands and have host headers set up for each, a unique live chat script can be generated for each brand that is set up. Leaving this as the default means that the script will be generated for the SmarterTrack Base URL.
- **Script Type** - There are 2 script types, depending on how and when you want the live chat script to load. They are:
 - **Normal Script** - Select this option to generate a standard link script.
 - **Deferred Script** - Select this option to make your live chat links load after the rest of your website is loaded into a visitor's browser. Using a deferred script means that your entire website will still load even if your SmarterTrack portal is down. When using a normal script, the live

chat links will load first, thereby potentially causing your website to fail to load if there are problems with your SmarterTrack portal.

- Put in <HEAD> tag - This is the actual script that will be placed on your website, between the <HEAD> and </HEAD> tags. The code should be copied and pasted exactly as it appears.
- Put in Place of Image - If you are not going to use an image for your online/offline status indicators, and are planning on using text only, copy and paste this script in the location where you want your live chat status to appear.

Chat Rooms

While temporary agent conversations are hosted via instant messenger, some companies may want to conduct virtual meetings with employees. In this case, the administrator may create permanent chat rooms to host agent conversations. Chat rooms allow multiple different agents to join in group-level, department-level or even company-level conversations versus the one-on-one type of conversation handled via instant messenger.

To view a list of permanent chat rooms, click the live chat icon . Then expand Chat Rooms in the navigation pane and select the type of chat room that you want to view (options include active and inactive chat rooms). Note: Administrators may need to access the chat rooms by clicking the settings icon , then expanding the System Settings and Live Chat folders in the navigation pane and clicking Chat Rooms .

Chat rooms function identically to instant messages. For more information, see Instant Messenger Overview .

Active and Inactive Chat Rooms

To view an active or inactive chat room, expand Chat Rooms button in the navigation pane, then click Active to view active chat rooms or click Inactive in to inactive chat rooms. Depending on which item is selected, a listing of all active or inactive chat rooms for which the agent has access will load in the content pane.

The following options are available from the content toolbar:

- Join - Allows the agent to join the chat room.
- Search - Allows the agent to search for a chat room.
- Refresh - Depending on the system settings, the Workspace may or may not automatically refresh itself at regular intervals. Clicking this button will force the Workspace to refresh.

By Chat Room

Agents can join a specific chat room by expanding By Chat Room in the left tree view and selecting the appropriate chat room.

Live Chat Distribution Methods

There are two basic distribution methods for live chats: the default distribution and Round Robin distribution, and the method used is determined by administrators when configuring Live Chat Settings . On the Options tab in Live Chat Settings, if the box next to "Distribute chats via Round Robin" is checked, then that distribution method will be used. If it is unchecked, live chats will follow the default distribution model.

Default Distribution

Also known as "cherry picking," under the default distribution method, all live chats are directed to the queue and agents must manually select the live chats to participate in. This model is typically preferred by smaller companies with lower volumes of live chats.

Administrators that choose this distribution method should note the following:

- Live chats are never assigned to agents automatically.
- An audible alert will notify agents when a live chat is in the queue. The basic notification sound can be configured in the same manner as the other chat sounds.
- If there are no agents receiving live chats, the system will treat chat as offline.

Round Robin

Most companies will use this distribution method for live chats because it attempts to give all of the agents an equal percentage of the workload. Under this distribution method, each agent has a maximum number of live chats that he/she can work on at a time. When a new live chat is initiated, the system checks the active agents within the live chat group to determine which agents have not met their maximum limit. The live chat is then assigned depending on the number of live chats the agent is working on and the amount of time that has passed since a live chat was last assigned to the agent.

For example, assume a company has three agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to five chats at once. Joe and Bob are relatively new, and can handle one and two simultaneous chats at once. If none of the agents are engaged in a live chat when a new live chat is initiated, the system will perform the following checks to determine which agent will receive the live chat:

- The system will first check to see who has the lowest percentage of capacity.
- The system then checks to see which agents have the lowest number of live chats.
- Finally, the system checks to determine which agent has the earliest Last Chat Ended time.

So in the example above, the agents with the lowest percentage of capacity are Sue, Bob, Joe. All of the agents have the same number of live chats (none), but the most time has passed since Joe participated in a live chat. Therefore, the system will assign the live chat to Joe.

Time Logs

Time Log Categories

Administrators can create categories to organize time logs into related groups. For example, if a administrator wants to easily track how much time is spent working for a specific customer, he can create a category for that customer. Then, whenever an agent creates a time log for an issue concerning that customer, the agent can assign it to the appropriate category.

To access time log categories, click the settings icon . Then expand the System Settings and Time Logs folders and click Time Log Categories in the navigation pane. A list of time log categories will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple time log categories. Time log categories must be selected before choosing an action from the toolbar.
- Category Name - The name of the time log category.
- Description - A short description of the time log category

In general, the following options are available in the content pane toolbar:

- New - Creates a new time log category.
- Edit - Allows the agent to edit an existing time log category.
- Delete - Permanently deletes the selected time log category.
- Refresh - Refreshes the list of time log categories in the content pane.

To view a specific time log category, simply double-click the appropriate time log category. The time log category will load in a popup window and the following fields will be available:

- Category - The name of the time log category.
- Description - A short description of the time log category.

Who's On

Who's On Settings

Who's On is a great way to take stock of your website traffic, and then act on that knowledge, by allowing agents and managers to see who is on a website, where they are from, where they were prior to coming to the website and then follow visitors as they travel from page to page. For example, sales agents can see when a visitor lands on a specific page and possibly invite the visitor to a live chat or even push a live chat to the visitor to entice them to buy.

To access this section, click the settings icon . Then expand System Settings and Who's On and click Who's On Settings from in the navigation pane. The Who's On settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- **Purge Idle Users** - An idle visitor is someone who comes to a site and then, for whatever reason, they sit for a period of time without taking any additional action. For example, a visitor lands on your site and then opens a new browser tab and starts surfing another site. These visitors you probably don't want to continue monitoring, so you can purge them from Who's On tracking. By default, this option is set to 15 minutes.
- **Purge Removed Users** - The amount of time after which idle visitors can be purged from Who's On tracking. By default, this option is set to 2 minutes.
- **Purge Pending Users** - The amount of time after which idle visitors can be purged from Who's On tracking. By default, this option is set to 5 minutes.
- **Invitation Ignored After** - The amount of time after which an ignored live chat invitation disappears from the visitor's screen. By default, this option is set to 2 minutes.
- **Virtual Page for Script** - The page that can be used to summarize the contents of the actual page the visitor is viewing. For example, if the Web page URL is lengthy, the administrator may want to create a virtual page with a shorter identifier.
- **Tracking Script** - The JavaScript that must be placed on the website pages that Who's On will monitor. Note: Administrators can incorporate custom variables in the tracking script to collect additional information on website visitors. For more information, refer to the KB article [How To Use Custom Variables in Who's On Tracking Scripts](#) .

Invitation

Use this tab to edit the settings for how and where an invitation to chat appears to the visitor:

- **Horizontal Alignment** - To specify the horizontal alignment of the live chat invitation on the customer's browser window, select the appropriate option from the list.
- **Horizontal Offset** - The number of pixels by which the live chat invitation is offset from the horizontal alignment.
- **Vertical Alignment** - To specify the vertical alignment of the live chat invitation on the customer's browser window, select the appropriate option from the list.
- **Vertical Offset** - The number of pixels by which the live chat invitation is offset from the vertical alignment.
- **Enable absolute page position on invitations** - Checking this box will display the live chat invitation according to the offset and alignments specified. If this option is enabled, SmarterTrack will not take into account the position of the user's scroll bar when issuing the live chat invite.

Page History

Use this tab to edit the following settings:

- **Total Page Limit** - The maximum number of website pages displayed on a visitor's page history in Who's On. By default, this option is set to 1,000.
- **First Viewable Pages** - The number of website pages the visitor initially viewed. By default, this option is set to display the first 50 pages the visitor viewed.
- **Last Viewable Pages** - The number of website pages the visitor last viewed. By default, this option is set to display the last 50 pages the visitor viewed.
- **Display only first and last viewable pages in history** - Checking this box will only display the first and last viewable pages in the visitor's Who's On page history. If this option is enabled, any other pages visited will not display in the page history. By default, this option is disabled.

Who's On Filters

With Who's On filters, administrators and agents have the ability to segregate website and/or portal visitors into groups based on the pages they are viewing. For example, sales agents may only be interested in visitors on product pages or people who are progressing through your shopping cart while marketing agents may be interested in visitors on specific landing pages that were used for promotions or in currently-running advertisements on radio, television, banner ad campaigns or PPC.

To access Who's On filters, click the settings icon . Then expand System Settings and Who's On and click Who's On Filters in the navigation pane. A list of Who's On filters will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple filters. Who's On filters must be selected before choosing an action from the toolbar.
- **Filter Name** - The name of the filter.
- **Brand Filter** - The brand to which the filter is assigned.
- **Conditions** - The Who's On column by which the visitors should be grouped.
- **Filter Enabled** - Indicates whether or not the filter is enabled.

The following options are available from the actions toolbar:

- **New** - Creates a Who's On filter
- **Edit** - Allows the administrator to make changes to a filter's settings.
- **Delete** - Permanently deletes the selected filter(s).

To view the settings for a filter, simply double-click the filter. The filter settings will load in the content pane and the following tabs will be available:

Filter

Use this tab to edit the following settings:

- **Filter Name** - The name of the filter.
- **Brand Filter** - The brand to which the filter is assigned.
- **Enable Filter** - Checking this box will allow visitors to be grouped using this filter.

Conditions

Use this tab to specify how this filter will group visitors (by browser, city, hits, etc.). When viewing this tab, the following options are available from the toolbar:

- **Save** - Allows the administrator to save changes made to a filter's settings.
- **Add Condition** - Allows the administrator to add filter criteria.
- **Edit** - Allows the administrator to make changes to filter criteria.
- **Delete** - Permanently deletes the selected condition(s).
- **Cancel** - Cancels the creation of the filter.

Broadcast Messages

A broadcast is a system-wide announcement that can be distributed to a select group of agents, users, or portal visitors. For example, companies might use a broadcast message to inform employees and customers of a planned Web site outage or to remind employees of a meeting.

To access this section, click the settings icon . Then expand the System Settings and Who's On folder

and click Broadcast Messages in the navigation pane. A list of broadcast messages will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple messages. Broadcast messages must be selected before choosing an action from the toolbar.
- **Broadcast Name** - The name of the broadcast message.
- **Brand** - The brand to which the broadcast message applies.
- **Recipients** - Indicates which types of users will receive the message.
- **Filters** - The Who's On filter to which the broadcast message applies.

The following options are available from the actions toolbar:

- **New** - Creates a new broadcast message.
- **Edit** - Allows the administrator to make changes to a broadcast message.
- **Delete** - Permanently deletes the selected message(s).
- **Send** - Sends the selected message(s).

To view the settings for a broadcast message, simply double-click the message. The message settings will load in the content pane and the following fields will be available:

- **Broadcast Name** - The name of the broadcast message.
- **Recipients** - To specify the recipients of the message, choose the appropriate option from the list.
- **Message** - The text of the broadcast message.

Globalization

Supported Languages

With support for nearly 60 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Setting up language support for SmarterTrack is a multi-step process. For detailed instructions, please refer to the KB article [How To Set Up SmarterTrack to Support Multiple Languages](#) . Use the Supported Languages section to create language support for translatable strings. For more information, see [Translatable Strings](#) .

To access the Supported Languages section, click the settings icon . Then expand System Settings and Globalization and click Supported Languages in the navigation pane. A list of currently supported languages will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple languages. Languages must be selected before choosing an action from the toolbar.
- **Language** - The language name and dialect, if available.
- **Locale** - The language and the geographic location in which the language or dialect is used.
- **Default** - Indicates if the selected language is the default language.
- **Enabled** - Indicates whether support for the selected language has been enabled.
- **Language Pack Exists** - Indicates whether the language pack has been installed into SmarterTrack.

The following options are available from the actions toolbar:

- **New** - Allows the administrator to designate a new supported language.
- **Edit** - Allows the administrator to make changes to a supported language's settings.
- **Delete** - Permanently deletes the selected supported language(s).

To edit the settings for a specific language, simply double-click the language. The supported language details will load in the content window.

Translatable Strings

Some phrases and words may not be available for translation through a specific language pack. When this happens, administrators can use translatable strings to define these phrases and words. For example, a U.S. company with customers in Spain may create a translatable string to translate the company's department names (billing, sales, etc.) into Spanish (ventas, facturacion, etc.)

To access the Translatable Strings section, click the settings icon . Then expand System Settings and Globalization and click Translatable Strings in the navigation pane. A list of translatable strings will load in the content pane.

The following columns are available:

- **Translatable Strings** - Use these boxes to select multiple languages. Languages must be selected before choosing an action from the toolbar.
- **Token Name** - The identifier for the translatable string. Note: Token names must begin and end with @@.
- **Description** - A summary describing the purpose of the translatable string.
- **Status** - Indicates whether the translatable string can be translated into the supported languages.

The following options are available from the content pane toolbar:

- New - Allows the administrator to designate a new supported language.
- Edit - Allows the administrator to make changes to a supported language's settings.
- Delete - Permanently deletes the selected supported language(s).

To edit the settings for a specific translatable string, simply double-click the translatable string. The translatable string settings will load in the content window and the fields for the supported languages will be available in addition to the following fields:

- Token Name - The identifier for the translatable string.
- Description - A summary describing the purpose of the translatable string.
- Fields for the supported languages.

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.

Activation

Licensing

To access view licensing information for SmarterTrack, click the settings icon . Then expand System Settings and Activation and click Licensing in the navigation pane. The edition, version, and license level information for the version of SmarterTrack currently being used will load in the content pane.

he following options are available from the actions toolbar:

- Activate Key - Activates a new SmarterTrack license key.
- Reactivate Key - Reactivates a SmarterTrack license key.
- Details - Displays details about the license, including feature, status, expiration, limits and available trials.
- Buy Now - Allows the administrator to purchase a new license key.

SmarterTrack Self Diagnostic

Use the SmarterTrack Self Diagnostic to test your SmarterTrackserver for errors. To access this

feature, click the settings icon . Then expand System Settings and Activation and click Self Diagnostic in the navigation pane. SmarterTrack will perform a test and display the results in a popup window.

SmarterTrack's self diagnostic tool will review a variety of different settings to help administrators troubleshoot potential issues. For example, the tools will check file permissions, internet connectivity, folder permissions and more.

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SmarterTools, Inc. Software License Terms

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- * Services, support, advice, and recommendations related to this Software that may be made available by SmarterTools on the Internet, in the Software documentation, or by telephone
- * Any and all Technical Support Services offered in connection with the Software

DEFINITIONS

The following definitions shall apply for the purposes of this EULA:

- * "Dedicated Hosting" shall refer to an individual, group, or organization ("Dedicated Host") that maintains a physical server device that is wholly or, in the case of Virtual Private Servers ("VPS"), a dedicated portion of a physical server device that is sold, leased, or otherwise made available to a third party; whether or not a fee or other compensation is exchanged; and in which the third party has authorization and/or access to the activation areas of the software and/or to system administration functions.

* "Effective Date" shall be the date upon which this EULA was accepted by You.

* "Elastic Computing" shall refer to a user's ability to install software, create websites or instantiate a database on one or more Workers that can then be given incremental CPU cycles or percentages, memory (RAM) allocations, and/or physical disk space and bandwidth allocations that can all, then, be managed (increased or decreased) separately and on an as needed basis.

* "Failover" is the ability of a system to automatically switch to a second, standby system should the primary system fail or is temporarily shut down.

* "License" shall refer to the revocable, non-exclusive, non-transferable license to use the Software ("License") in accordance with the terms and conditions of this EULA. The term License applies to purchased and non-purchased Licenses, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable and/or activate the software or certain Features Selection(s) in the Software (collectively, "License Keys").

* "License Key" shall apply to the alphanumeric combination entered/applied upon installation and used to access Feature Selections. License Keys are delivered to the owners of purchased (paid for) Licenses and to those who may receive authorized promotional or trial Licenses, if applicable (pursuant to this EULA). SmarterTools may create and provide certain Levels, Editions, and/or Versions of the Software that do not require entry or use of a License Key for promotional or other purposes. This EULA remains in full force and effect whether or not a License Key is required or provided by SmarterTools.

* "Load Balancing" is a networking methodology whereby processing and workload is distributed evenly among a group of independent machines (e.g., servers) so that no single device is overwhelmed and so that there is no single point of failure.

"Multi-tenancy" and "Multi-tenant license(s)" shall refer to the ability of any single license to support multiple separate and unique client organizations, particularly when offering a single license in a Software as a Service (SaaS) capacity. For the purposes of this EULA, only SmarterStats and SmarterMail are multi-tenant licenses.

* "Periodic License" shall be a License with a defined temporal component (start and end date) whether or not such License is subject to renewal, automatically renews, effectively terminates, or is extended (e.g., Monthly/Lease Licenses, Trial Licenses, Development Licenses). Periodic Licenses may be governed by additional terms and conditions in a separate written agreement.

* "Third Party Providers" shall be any other software, application, plug-in, add-on, utility, tool, device, or methodology by any individual, group, organization, affiliation, company, or other entity that connects, modifies, links, and/or integrates to/with the Software for any purpose whatsoever.

* "Shared Hosting" shall refer to an individual, group, or organization ("Shared Host") that maintains a physical server device upon which software and/or tools are owned and installed by the Shared Host and made available to third parties for access or use; whether or not a fee or other compensation is exchanged; and in which the third parties do not have authorization or access to the activation areas of the Software and/or do not have authorization or access to system administration functions.

* "Worker(s)" shall be the location where software, websites or databases are installed in an Elastic Computing environment. A Worker can then have CPU cycles, disk space and RAM allocations and bandwidth modified (i.e., increased or decreased) on an as needed basis to accommodate shifts in traffic and usage. Also known as a worker process.

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C. Third Party Providers and Web Services

The Software is designed to integrate and/or to be used in conjunction with Third Party Providers through Web services. SmarterTools assumes no liability and makes no warranty or guarantee regarding the applicability of effectiveness of this Software when used in conjunction with these products or whether or not such integration or use might interfere with the operation therein. You agree to hold SmarterTools harmless in all matters resulting from the integration or use with Third Party Providers.

D. Limitation of Liability

Your sole remedy under this Agreement shall be limited to replacement of the Software.

4. Technical Support

Currently, SmarterTools provides technical support for the Software via SmarterTools personnel, documentation, and Internet resources. Depending on Your Features Selection, including but not limited to pricing, volume, Software version, and the number of licenses You purchased, a certain amount of technical support may be included at no additional charge. Otherwise, technical support may be available for an additional charge on a per incident, per call, or per time-frame basis or in other support packages. The amount of these charges may vary from time to time. Technical support is provided AS-IS, and the provisions of section 3.A., 3.B., and 3.C. apply to technical support.

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7. Jurisdiction.

This Agreement shall be governed in all respects by the laws of the United States and the State of Arizona, except for conflict of law's provisions. The parties agree that for any dispute, controversy, or claim arising out of or in connection with this Agreement, venue and personal jurisdiction shall be in the federal, state, or local court with competent jurisdiction located in Maricopa County, Arizona. The prevailing party will be entitled to an award of reasonable attorney's fees.

In the case that You are an agency or entity of the United States Government, the following additional terms apply:

* The Software qualifies as Restricted Computer Software, as defined in the Rights in Data-General clause at Federal Acquisition Regulations 52.227-14.

* Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013.

8. Payments.

You shall pay the total fee(s) for the Software imposed by SmarterTools at the time of purchase. You shall pay all invoices rendered by SmarterTools within thirty (30) calendar days after the invoice date, or within another time frame set forth by SmarterTools in writing in a separate agreement. All payments shall be made in United States Dollars (\$). If You fail to pay any amount due within the above timeframe, SmarterTools may impose late charges equal to the lesser of 1.5% per month or the highest interest rate allowable by applicable law, together with all related expenses and collection costs, including reasonable attorneys' fees, incurred by SmarterTools collecting any amounts owed under this EULA. Further, You shall reimburse SmarterTools for any out-of-pocket expenses incurred in connection with duties performed by SmarterTools hereunder. Upon request by You, SmarterTools

shall provide You with reasonable documentation evidencing the out-of-pocket expenses incurred by SmarterTools.

SmarterTools may disable License Keys for invoices that are not paid within a reasonable timeframe as determined by SmarterTools in its sole discretion. Licenses purchases that are made fraudulently, deceptively, or that result in a charge-back or disputed charge are considered to be not paid and are subject to disablement at the sole discretion of SmarterTools.

9. Limitations to Customization.

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* You shall maintain and not remove or obscure any proprietary notices in the Software. The SmarterTools name may be displayed in any font type or style, but it must be displayed in no smaller than 8-point font. The name of the Software shall remain visible to the naked eye and free from any clutter or similar color scheme (e.g. black font on a black or similarly dark background that would preclude the user from easily identifying the Software). Use of the qualifiers "powered by" and "provided by" is permitted (e.g. "Powered by SmarterMail"). Any deviation from these limitations must be approved in writing by SmarterTools in advance of implementation and may result in additional license fees, if applicable.

* All applicable copyright and trademark information shall not be removed, remain visible to the naked eye, free from any clutter or similar color scheme, and can be displayed in any font type or style but shall be displayed in no smaller than 8-point font.

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At purchase of the Software and at other times during the term of this EULA You will be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g. credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

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In all events, conditions, and circumstances the provisions and limitations of Sections 3, 5, and 7 shall apply.

12. Severability.

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein.

13. Entire Agreement.

This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and understanding relative thereto, if any, being herein merged. This Agreement replaces and supersedes any prior agreement entered into between the parties hereto with respect to the subject matter herein.

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Rev. 20120524

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