



# My Settings

Help Documentation

## My Settings

### My Preferences

Agents can adjust a number of settings within SmarterTrack to customize their experience within the interface and the behavior of SmarterTrack. To edit your personal settings in SmarterTrack, log into the management interface with an agent account. Then click on the Settings icon . My Preferences will be loaded in the preview pane, and the following tabs will be available:

#### Options

- Username - The username that is used to log into SmarterTrack. Only administrators can modify this setting.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow agents to log in using a standard password, authenticate against active directory or by using an external provider that integrates your login with an external, third-party product like a CRM or control panel. Only administrators can modify this setting. Note: If the administrator has chosen password authentication, agents can modify their passwords by using the Change Password button in the content pane toolbar.
- Authentication Domain - When Active Directory authentication is used, this is the domain name used for the authentication of your login username and password. Only administrators can modify this setting.
- Email Address - The agent's email address.
- Display Name - The friendly name used to identify the agent within the SmarterTrack system.
- Display Name for Chat - 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 via live chat.
- 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.
- Preferred Language - The language the agent would like the Web interface to be shown in. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.
- Theme - Specify the general color theme of the SmarterTrack management interface: Light or Dark.
- Preview Pane - To specify where the preview pane appears in the management interface, select

the appropriate option from the list: Right or None. By default, the preview pane appears on the right. Disabling the Preview Pane will display only a list of items (tickets, call logs, tasks, etc.) in the item list and each item must be individually opened in order to view its contents.

## Contact Info

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. An employee's website and home address can be added on this tab as well.

## Portal Settings

- Avatar Provider - SmarterTrack allows agents and users to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.
- Avatar - The display picture as provided by the Avatar Provider or the avatar uploaded via the Choose File button.
- Subscribe to community posts automatically - Checking this box allows you to automatically subscribe to Community threads that you create or post in.
- Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads you're subscribed to that have had a new reply or the status or type changed.
- Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.
- Portal Signature - Agents can use this field to create a signature that will be displayed on Community threads and in their replies to Community posts. Using the HTML editor, Agents can fully customize their signatures. For example, to bold a word, add the `<b>bold</b>` HTML tags around the word. Changes made here will be reflected in the Portal Signature setting found at the Portal | My Settings and vice versa.

## Custom Fields

This tab displays the available custom fields for agent preferences. For more information on custom fields, see Custom Fields .

## Tickets

These settings allow Agents to receive and reply to ticket messages directly from their email application/client. NOTE: When replying to tickets from an email client, the reply to the ticket will actually be sent from the SMTP account set up for the department within SmarterTrack, NOT from the user's SMTP account. In addition, replies from an email client will mark the ticket as "Waiting".

- **Copy To Address** - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.
- **Other Reply From Address(es)** - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.

## Live Chat

Use this tab to edit the following settings regarding the handling of live chats:

- **Pop-up new chats automatically** - Checking this box will display new live chats in a popup window. By default, this option is enabled.
- **Play chat sounds** - Checking this box will enable SmarterTrack to play sounds when certain timeframes are exceeded or when certain things occur. By default, this option is enabled. Sounds will occur in the following instances: 1. When a chat initially goes into the Queue, before it's taken by an Agent. (When Round Robin is NOT being used for Live Chat distribution.) 2. When a chat enters an IDLE status when being handled by an Agent. 3. When a chat enters a WARNING status when being handled by an Agent. 3. When a chat enters a CRITICAL status when being handled by an Agent. 4. When a chat is being handled by an Agent, but the chat window isn't focused, and a new message is received from an end user.
- **Play sound when a chat is queued** - 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.

## My Events

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.

There are two categories of events in SmarterTrack: agent-level events and system-level events. For more information on system-level events, please see [Events](#) . For a complete breakdown of the events system, including how to create a new event and details on the event categories available, see the [Events](#) folder found in the [Help for Users & Administrators](#) section of the Online Help.

To access agent-level events, log into the management interface with an agent account and click on the [Settings](#) icon . Then click on [My Events](#) in the navigation pane. A list of configured events will load in the content pane and the following tabs will be available:

## Events

Agent-level events configured in this section apply only to the agent configuring the event. 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.
- **Enabled** - Indication of whether the event is enabled or disabled. The event will only trigger if it is enabled.
- **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.

To view the settings for a specific event, simply double-click the event and the settings will load in the content pane. To create a new event, click the [New](#) button on the content pane toolbar. For more information on how to create a new event, see [Creating New Events](#) .

## Notification Profiles

Notification profiles determine how event messages are sent. Options include text message or email. Agents can modify the default notification profile or create additional ones using the [New](#) button in the content pane toolbar.

In general, 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.

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:

- 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 reminder - Checking this box will allow the agent to receive notifications in a pop-up window.