Manage

Help Documentation

Manage

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 so there may only be 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 all of these scenarios by allowing companies to set up separate brands without having to install multiple different instances of SmarterTrack.

The TRUE benefit of Brands, however, is in Employee management. Utilizing a multi-Brand configuration in SmarterTrack allows a company or business to support all of their Brands using a single Agent base. That means that a single Agent can handle sales or support (or billing...or customer service...) requests from multiple Brands at the same time. This allows a company to maximize their coverage while minimizing the need to hire Agents specific to one Brand. Agents can work with customers in each brand separately, and customers of each brand have access to customized and brand-specific web portals.

Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface, as well as Department and Group creation. That means that each brand can have its own set of Departments and Groups, and Agents within those brand-specific Departments and Groups.

To access the Brands section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Brands . Any brands associated to your company will load in the content pane.

To add a new brand, click New in the content pane toolbar. A modal window will display fields for the Brand Name and Host Header. Once saved, the additional brand settings will appear in the content pane. To view the settings for a specific brand, simply double-click the brand or use the Edit button. The brand settings will load in the content pane and the following tabs will be available:

Jump to:

- Options
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- Portal
- Cookie Disclaimer
- Custom Links

- Autoresponders
- Business Hours
- Holidays
- Custom Messages
- Community Categories

Options

Use this tab to edit the following settings:

- Brand Name - The name of the brand. This can be a company name, a product name, a division of the company, etc.
- Company Website - The URL to the primary website for the brand.
- Host Headers - Host headers allow a Web server to host more than one website domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For those using self-installed SmarterTrack, you will want to make sure your SmarterTrack domain in IIS has the proper bindings set up for the various host headers you want to use in addition to adding them for each Brand in SmarterTrack. For those using the hosted SmarterTrack helpdesk, please see Point Your Own Domain Name at your Hosted SmarterTrack Helpdesk . Note: Host headers cannot be edited after the brand is created.
- Default Font - The font family that will be used by default for items created within or for the brand, such as ticket messages, canned replies, knowledge base articles, etc.
- SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for brand-level notifications (e.g., any one of the email templates). Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Brand, click Add SMTP Account . A modal window will display the following options:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which brand messages are sent.
- Display Name - The name used to identify the mail server. This field is optional but recommended.
- Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
- 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.
- SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
- SMTP Auth Password - The corresponding password used to authenticate with the SMTP

server. This field is optional.

• Ignore SSL warnings - Select this option to ignore any SSL warnings received when connecting the SMTP account. Generally, SSL warnings are just those: warnings. Ignoring them does not mean that there is something incorrect in the set up.

• Default - Check this box to make the SMTP account that's set up as the Default SMTP account for the entire Brand.

• Enable Cookie Disclaimer - Enabling this will activate the Cookie Disclaimer tab. This tab allows a system administrator to create customized text that appears when a someone visits the Portal for the first time. This disclaimer explains the brand's cookie policy and can be used to link to a more detailed cookie policy page.

• Google Analytics Site ID - The unique identifier used to track your site in Google Analytics. Adding in a Google Analytics ID helps track visitors to all pages of your SmarterTrack site: the Portal, Management Interface, etc.

• Company Favicon - A favicon is an icon that is associated with a URL and displayed in a browser’s address bar or next to the site name in a bookmark list. Upload a custom favicon for the brand by clicking on Choose File. Then browse for the ICO file. (Favicons must be uploaded in .ico format. Recommended sizes for a favicon are 32x32, 64x64 or 128x128 pixels.) Click Save then navigate to the brand's Portal or refresh the Portal site to see the new favicon. (In some browsers, refreshing the Portal 2-3 times may be required before the browser will pull in the new favicon data.) Note: If multiple brands are configured, the favicon of the Default Brand will be displayed when viewing the Management Interface.

• Display logo on portal - Checking this box will display the company logo on the Home page of the Portal.

• Company Logo - The logo to use for the brand. Click on Choose File to upload an image. Remove Logo deletes the uploaded logo and reverts to the default, or you can upload a new company logo as needed.

Permissions

Use this tab to edit the following permissions for your brand:

• View Community - From the dropdown, select the Role necessary for portal visitors to view, and reply to, various threads in the Community. If the Community needs to be hidden from everyone, this should be set to Nobody and it's button will not be displayed on the Portal. Note: This selection also determines which users can privately message other users at the Portal. Community messaging is enabled for any Registered User with permission to view and participate in Community threads.

• Create Community Threads - From the dropdown, select the Role necessary for portal visitors to start new threads in the Community.

• Minimum Posts to Post Links - Administrators can now control the minimum number of Community posts a user must have before they can post links to other sites or services that are clickable. This is to prevent one-off, drive-by spamming of Community posts from single-post users. By default, this is set to 3.
• Post Links in KB Feedback - Similar to the above, Administrators can limit the type of user that is able to post links in KB feeback. By default, this is set to Registered User with Verified Email as these types of users are generally confirmed by a company.
• View Ticket Requires - From the dropdown, select the Role necessary for portal visitors to view tickets in the portal.
• View News Requires - From the dropdown, select the Role necessary for portal visitors to view News items in the portal.
• View KB Articles Requires - From the dropdown, select the Role necessary for portal visitors to view Knowledge Base articles in the portal.
• New feedback starts out moderated - Checking this box means that any new feedback left on a knowledge base article will first have to be reviewed and approved by a portal administrator before it is viewable by users. By default, this option is checked.
• Users can change display name - Checking this box will allow users to change their display name. By default, this setting is enabled.
• Users can change email address - Checking this box will allow users to change their email address on file. By default, this setting is enabled.
• Users can change password - Checking this box will allow users to change their login password. By default, this setting is enabled.
• Users can change profile information - Checking this box will allow users to change their profile information on file. Profile information includes phone numbers, address, time zone and preferred language. By default, this setting is enabled.
• Users can upload custom avatars - Checking this will allow users to upload their own, custom avatars for display in the portal, such as in the Community.
• Require approval for custom avatars - Checking this means that any custom avatar use will first need to be approved by portal administrators before they are displayed in the portal.

Portal

Use this tab to edit the following options for your brand’s portal:

• Chat Link Style - Use this dropdown to select the live chat link to be displayed on the portal. Any live chat link configured in the Configuration | Live Chat settings will be displayed here.
• Display live chat in portal - Checking this box will display a link to initiate a live chat throughout the Portal. By default, this setting is enabled.
• Display social network links - Checking this box will display social network links in the portal

that will allow knowledge base articles and news items to be shared. By default, this setting is enabled.

• Display 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.

• Enable login form - Checking this box will display a Login button at the top of the Portal, allowing users to login to the portal. By default, this setting is enabled. Note: If this setting is disabled, Agents and Administrators can only log in by going to the exact URL of the management side of SmarterTrack, which is, by default, your-SmarterTrack-domain.com/Management/Root.aspx.

• Enable new user registration - Checking this box will display a Register button at the top of the Portal that allows visitors to register for an account for the portal. By default, this setting is enabled.

• Enable Gravatar support for automatic avatars - Gravatar is a service that allows users to maintain a singular avatar image for a consistent online presence across multiple different properties. It's a simple and efficient way to use the same avatar on multiple websites. Checking this box allows users to use their Gravatar images versus uploading a custom image.

• Enable Knowledge Base voting in portal - Checking this box will display helpfulness voting options on knowledge base articles in the portal for both end users and Agents.

• Ticket and Chat Privacy Policy URL - This is the direct link to your privacy policy, EULA, Terms of Service or whatever page that details your privacy terms, service terms, etc. that you want to put in front of your users. Checking the box next to Enabled inserts a message on the Ticket and Chat submission pages that a user must consent to prior to actually submitting a ticket or chat to your agents. The URL that's provided is used as the link for the Privacy Policy text that's part of this message.

• Primary Color - This is the color for the main menu buttons on the portal (Home, Knowledge Base, News, etc.) and the titles of the news items on the News page. The default is #055E8A.

• Secondary Color - This is used for minor highlights such as lines, separators, asterisks, etc. that are used throughout the Portal. The default is #222222.

• Primary Button Color - The standard button color for buttons such as Start Ticket, Submit Thread and the icons on used for the Knowledge Base, Community, Tickets, etc. The default is #3A87AD.

• Secondary Button Color - The color for secondary buttons such as Search buttons. The default is #666666.

• Button Text Color - The color for text that appears in both primary and secondary buttons. The default is #FFFFFF.

• Content Background Color - The default color for the main content areas of the portal. The default is #FFFFFF.

- Navigation Bar Color - The color of the top bar of the portal, where the User, Alerts and language selection buttons reside. The default is #545454.
- Text Color - The color for the majority of text as it appears in the portal and on the community. This includes KB text, community posts, etc. The default is #333333.
- Link Color - This is the color for any hyperlinks on the portal, including those used to view knowledge base articles, links to view tickets and threads and any links within the KB articles or Community threads. The default is #0088CC.
- Custom CSS Style Overrides - Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them. SmarterTrack allows administrators to stylize their brand portals with fully customizable CSS. 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 create a version of that style yourself and then paste it in this box to override the default. Realize this will happen wherever that style is used, so changing one style can affect the portal in multiple areas. To revert back to the default style, simply remove your custom style from here and save your changes.

Cookie Disclaimer

Many times, businesses want to make sure their privacy policies, cookie policies, terms of service or other information is presented to users of their Portal. To this end, it's possible to provide users with some generic text about these policies and/or terms as well as ensuring they agree to said policies and/or terms.

Since there are may ways for businesses to present their portal, and the information contained within the portal -- not to mention, different permissions for starting live chats or tickets with Agents -- storing a user's acceptance of the terms or policies provided needs to be accurate, yet generic enough to accommodate all uses of SmarterTrack. As such, a user's acceptance of the item lists in this area are stored as a cookie on the user's local machine. The cookie expires after a year, or when the policy text is changed by an administrator.

- Privacy, Cookie and Terms of Service Disclaimer - This is the text that is displayed in the modal pop up once the option is enabled. The modal appears at the bottom of the portal the first time a user visits. Ideally, this text lets users know that the portal uses cookies to store a user's settings changes, and can include login details if the user opts-in to saving these login credentials. Generally, this text is short but it should include a link to a more detailed privacy or cookie policy for your company.
- Dislaimer Modal Primary Color - This is the background color of the modal that displays the

disclaimer text. By default, it's set to #237AFC.

• Dislaimer Modal Secondary Color - This is the color of the disclaimer text. By default it's set to #FFFFFF.

Custom Links

In order to create a sense of community with end users, companies may want to expand their 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. When adding custom links, administrators define the custom link title that is placed on the Portal and that links to a specific URL. Custom Links are different than external feeds in that External Feeds will actually extract snippets from the feed listed and display that text as a section on home page of the portal, whereas Custom Links create new text that is displayed under the main portal buttons and that links directly to the link URL provided.

To create a new custom link, click Add in the in the content pane toolbar. A modal window will display the following options:

• Brand - Use this dropdown to specify the brand for which the link will display.

• Title - The link name displayed in the portal.

• 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. For more information, see Roles .

Autoresponders

Autoresponders allow System Administrators to configure an automatic response that's sent to customers when they submit tickets to various Departments within SmarterTrack. SmarterTrack has default autoresponders that can be used, but they can be edited, or completely re-written, to include links to KB articles and additional resources that can help answer commonly asked questions. It's even possible to include new product announcements or other marketing-type material in autoresponders.

To edit an autoresponder, locate the Department it's associated to from the list of all configured Departments. Select the Department and click Edit in the content pane toolbar. (Alternatively, you can double click on the Department.) A modal window opens that displays the following tabs:

• Contents

This is where the actual message sent is configured. By default, SmarterTrack fills out a formatted message that includes several system variables for things like Ticket Number, Deparatment Name, etc.

that are automatically inserted into the reply. System Administrators can reconfigure these messages or change them entirely using the complete HTML editor.

• Options

  • Display Name - By default this is filled out using the name of the Department that the autoresponder correlates to. However, if a generic message is to be used, this Display Name can be changed to whatever the System Administrator wants.
  • Enable Autoresponder - Checking this box enables the autoresponder for use. An autoresponder must be enabled or it won't be sent as intended.
  • Max KB Search Results - By default, the autoresponder displays a list of knowledge base articles related to the ticket content. This is the maximum number of suggested knowledge base article links included in the text of the auto-responder. By default, this is set to 5.
  • KB Search Folder - The folder(s) SmarterTrack will search in before creating the list of suggested articles. By default this is set to All Folders.
  • View Ticket Online Text - The anchor text of the link for the 'View This Ticket Online' variable. It is enabled by default when that variable is used in the autoresponder body.
  • Browse KB Text - By default, the autoresponder 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.
  • Start Date / End Date - Just like autoresponders set up in an email client, SmarterTrack autoresponders can have start and end dates. When configured, these autoresponders will be used in place of any other autoresponders set up for a Department. This makes is easy to set up different autoresponders for holidays or periods of time where a different message needs to be sent to users.
  • Departments

Use this tab to select the Departments that will use this particular autoresponder. Generally, you can set separate autoresponders per Department, but when a start and end date are necessary, the same autoresponder can be used for any or all Departments that are configured.

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. In addition, when importing emails, the Department autoresponder will not be sent if an email is more than 3 days old.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

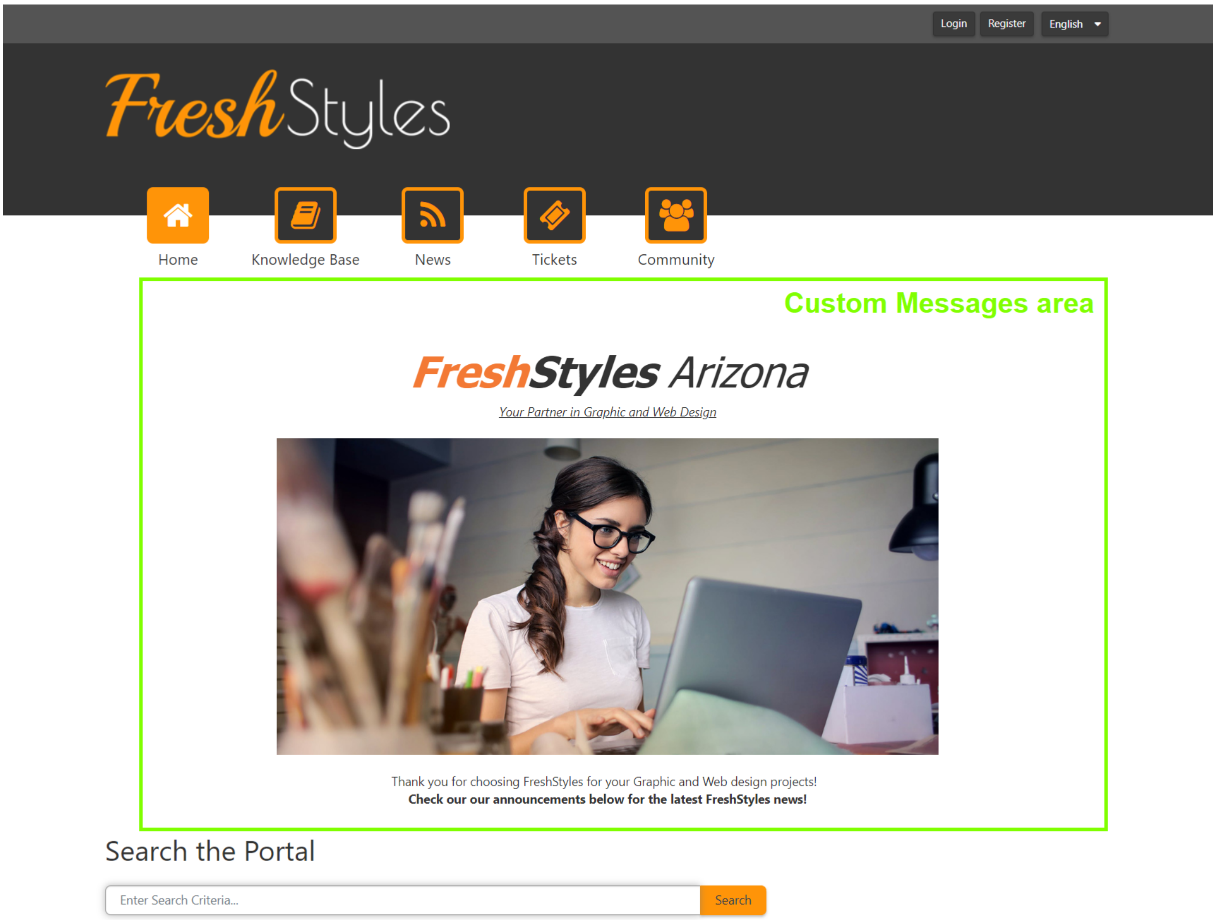
Holidays

Use this tab to specify company holidays. To add a holiday, click Add in the content pane toolbar. Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the portal.

- Main Portal Announcement - The text that displays on the portal home page. 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. Others may want to add graphics, banner ads or more to completely brand and customize how the portal looks for visitors. The Main Portal Announcement offers a complete WYSIWYG editor that allows all manner of customization. Regardless of what's added, the announcement will appear at the very top of the main content area of the portal.
- Additional Footer for Portal - The text that displays at the top of the portal footer above the SmarterTools copyright information.



Community Categories

SmarterTrack's Community is a centralized location brands can use to communicate with customers and end users, which is a key for any business. Categories are used to separate threads within the Community and can be things like key words, product names and more. Using the Add button in the content pane toolbar, add Categories that appear as options for any new Community threads. Community Categories can be made visible to everyone or to a select role. For more information, see Roles .

Departments

A department is the second level of the SmarterTrack organizational structure. Each brand will be broken down into departments. For example, a brand may have Sales, Support and Human Resources 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 or edit/delete existing departments.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon. In the Manage area of the navigation pane, click on Departments . 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 - The name of the department. For example, Sales, Support, Billing, etc.
- Email Importing - The POP email address being used to import tickets into SmarterTrack for the department. If a dash is present for a department, then POP importing is not configured for that 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. When creating a new Department, both the Department Name and Front Line Group are required. The Front Line Group is the first group to which tickets and live chats for the Department will be assigned. SmarterTrack will automatically create the Front Line Group after you have completed and saved these settings. All other configuration settings are optional. However, if you are using SmarterTrack's branding feature, you will also need to configure the appropriate Brand name setting. In addition, if you are supporting multiple languages, you will need to configure the appropriate language setting.
- 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 for the new department as needed.
- Delete - Permanently deletes the selected department(s). When deleting a Department you'll need to choose the action to take for items that belong to this Department. This includes how to handle ticket, live chat, call log and call log agent assignments. Generally, these will need to be handed off to another Department, if at all possible. Otherwise, information may be deleted.

To view the settings for a specific department, simply double-click the department. Alternatively, you can select a department and click the Edit button in the content pane toolbar. The department settings will load in the content pane and the following tabs will be available:

Jump to:

- Options
- Tickets
- Call Logs

- Business Hours
- Holidays
- Custom Messages

Options

- Brand - The brand to associate to the department.
- Department Name - The name of the department.
- Front Line Group - The default group that gets assigned tickets and live chats. A department can only have one front line group.
- SMTP Account - SmarterTrack does not utilize an internal SMTP server to send emails messages. Use this drop down to select the mail settings for outgoing tickets and department-level communications. Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings in the Configuration folder. To create a new SMTP account for your Department, click Add SMTP Account . A modal window will display and the following options will be available:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which department messages are sent.
- Display Name - The name used to identify the mail server. This field is optional but recommended.
- Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
- 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.
- SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
- SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.
- Preferred Language - The default language for the department.
- Allow advanced search for all agents to return contents of this department - Frequently, agents may need to access tickets in a department that they don't belong to in order to respond to customer inquiries. Enable this setting to mark a department as having their ticket contents visible to all agents. Agents can then find those items and see them in a read-only manner, when using Advanced Search. Managers are allowed to modify any item found this way, while agents are allowed to add comments only.
- Allow managers outside of this Department to view its contents. By default, only Employees with the Manager role can see the tickets in all Groups within a given Department. However, there are times with Managers in other Departments need to see tickets. This is especially true if 2 Departments work closely together, such as Sales and Support Departments. With this

checked, Managers from ANY other Department can view the tickets within the Department being edited.

Tickets

• New Tickets in Portal - The role required to submit a ticket via the portal. For more information, see Roles .
• Custom Field Template - The custom field template used when submitting tickets from the portal. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Custom Fields .
• Survey to Offer When Closed - To automatically offer a survey to customers after a ticket status has been changed to "closed" or "closed and locked", 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. NOTE: If any action is performed on a ticket, such as transferring it to another agent or group or even commenting the ticket, the waiting time will reset.
• 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 reopen when a customer sends a reply.) The default setting is 322 hours.
• 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.
• 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.
• 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 Templates section of Email .

Call Logs

• Custom Field 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 Custom Fields .
• Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. A department’s business hours can be inherited from the brand or configured separately. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

Note: Business hours follow the default time zone that is set for the installation. For more information on the default time zone, see Language and Locale .

Holidays

Use this tab to specify company holidays. A department’s holidays can be inherited from the brand or configured separately. To add a holiday, click Add in the content pane toolbar.

Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

Use this tab to create custom messages to be displayed on the ticket submission page of portal. Messages can be configured by Department, so that after the user selects the Department from the dropdown, the Message is displayed along the right sidebar. Custom Messages can include HTML formatted information such as additional contact details, the Department's business hours, etc.

- Before Ticket Submission - The text that is displayed on the ticket submission form immediately after the Department is selected.
- After Ticket Submission - The text that is displayed after a ticket is successfully submitted from the portal.

Groups

Groups are the last level in the SmarterTrack structure. Each department is broken down 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 levels of access to information. This section lists all of the groups that are currently available to your organization and provides administrators with the ability to add new groups and/or edit/delete existing groups.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Groups . 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.
- Department - The department to which the group belongs.
- Group Name - The name of the group.
- Round Robin - A True/False indication of whether tickets are distributed automatically via round robin distribution. If False, tickets will need to be 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.

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. See the information below for how to add or remove an Agent from a Group. The following options will be available:

- Agent - A dropdown where you select the name of the employee that is being added to the group.
- Ticket Handling - Select the method of ticket distribution for this agent. 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. Options include:

• Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. 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. Instead, they'll have to take tickets. 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 automatically 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 automatic round robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific 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.
• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.
• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.
• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, 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 automatic round robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific 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.

• Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.
• Hand-off on Auto-Inactive - Checking this box will automatically hand off any of an agent’s active tickets to another agent if the agent is automatically made inactive in the group.
• Automatically go active 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 into the management interface. If unchecked, agents will need to manually set themselves as active across their various groups.

Adding / Removing Agents

Follow the steps below to add an existing Agent to a Group:

• Log in to SmarterTrack as a System Administrator.
• Click on the Settings icon.
• Under the Manage header, click Groups . A list of available Groups will load in the content pane.
• Select the Group that you want to add an Agent to and click Edit in the content pane toolbar. (Alternatively, you can simply double click on the Group name.)
• Click the Agents tab. A list of all Agents currently assigned to the Group will display.
• Click the Add button. The Agent-Group Relationship modal window opens where you will select the Agent you want to add, as well as set the distribution method to use for the Agent, their Max Tickets and some other options.
• Select an Agent from the Agent list. All other settings are optional and can be modified at a later date, if needed.
• Click OK in the modal.
• Click Save .

To remove an Agent, follow steps 1 - 5 above, but instead of clicking the New button, select the Agent and click the Remove button.

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.

Employees

Just as the name implies, Employees, also known as agents, are employees of a company that are placed in various groups within departments to handle customer issues and requests using SmarterTrack. Employees are the ones that will manage tickets, live chats, tasks, write knowledge base articles and more.

To add new employees or edit existing Employee settings, log into the management interface with an administrator account. Then click on the Settings icon . In the Manage area of the navigation pane, click on Employees . Any Employees associated to your company will load in the content pane. By default, the Details for the first Employee listed will be displayed.

The following options are available from the actions toolbar:

- New - Creates a new Employee.
- Delete - Permanently deletes the selected Employee(s).
- Sorting - Sorts the list of employees based on user, email, last login, verfied status or role.
- Save - Saves any changes made to a specific Employee.
- Clone - Rather than creating a new Employee from scratch, administrators can clone an existing Employee and modify settings as needed.

To view the settings for a specific Employee, simply click the desired Employee from the list or double-click on their entry to pop out the configuration window. To add a new Employee, click New in the content pane toolbar. The Employee settings will load in the content pane and the following tabs will be available:

Jump to:

- Details
- Contact Info
- Portal Settings
- Roles
- Groups
- Custom Fields
- Tickets
- Live Chat

Details

Use this tab to configure the profile information of the Employee:

- Username - The username used to log into SmarterTrack.
- Authentication Method - The method used to log into 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 - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
- Confirm Password - When using password authentication, this allows administrators to verify the new password by re-typing it in this field.
- Force password change at next login - When enabled, this setting will force the specified agent or user to change their password the next time they attempt to log in. This allows administrators to create new users or agents with temporary passwords knowing that the user or agent will have to reset it when they first log in. This checkbox remains enabled for the specific user or agent until they log in to the portal or management interface and change their password, at which time the checkbox is disabled. This setting also affects new users or agents created via the SetUsersProperties API call. (NOTE: This setting does not apply to users authenticating via Active Directory.)

• Email Address - The Employee's email address.
• Display Name - The friendly name used to identify the employee 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 Display Name when they interact with customers via live chat.
• Time Zone - To specify the time zone, select the appropriate time zone from the list.
• Preferred Language - The language the Web interface should be shown in to this employee. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.
• Hourly Cost for Reporting - 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.

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. The employee's website and home address can be entered here as well.

• Website - If the employee has a website, it can be entered here.
• Home Phone - The employee’s home phone number.
• Cell Phone - The employee’s cell phone number.
• Work Phone - The employee’s work phone number.
• Other Phone - The employee’s alternate phone number.
• Address - The physical address of the employee.

Portal Settings

• Avatar Provider - SmarterTrack allows agents 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 one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.
• Avatar approved - Checking this box makes any uploaded custom avatar image appear on live chats, in ticket signatures, in community posts, etc. For agents who specify the use of an avatar provider (e.g., Gravatar), this box is not required in order for the avatar to appear.
• Subscribe to community posts automatically - Checking this box allows the employee to automatically subscribe to Community threads that they create or post in.

- Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads employees are 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 - Use this field to create a signature that will be displayed in the Portal, such as in Community threads and replies.

Roles

This tab displays the roles assigned to the employee. An employee's permissions are defined by the roles to which he/she is assigned. For more information on roles, see Roles .

To assign a Role to an Employee from Roles tab, simply select the checkbox next to the Role you want to assign. Then be sure to save your changes.

To remove a Role, simply uncheck it from the list and save your changes.

Groups

This tab gives administrators the ability to add, edit or remove the employee from a list of configured groups. When clicking an employee's Groups tab, a list of the various Departments and Groups are listed, along with that employee's Ticket Handling and Chat Handling distribution methods.

To view or change an employee’s settings for a specific group, simply double-click the desired row and the Agent-Group Relationship settings will load in a modal window. The following options will be available:

- Agent - The name of the employee that is being configured.
- Group - The name of the group that is being modified.
- Agent is a member of this group - Indicator of whether the employee is part of the group. To add an employee to a group, simply check this box and the remaining agent-group relationship settings will load in the modal window. To remove an employee from a group, uncheck this option and save.
- Ticket Handling - Select the method of ticket distribution for this agent. 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. Options include:

- Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. 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. Instead, they'll have to take tickets. 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 automatically 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 automatic round robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific 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 for this group. 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.
• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.
• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.
• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, 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 automatic round robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific 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.
• Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.
• Hand-off on Auto-Inactive - This setting is used in conjunction with Auto-Inactive. Checking this box will automatically hand off any of an agent’s active tickets to another agent if the agent

is automatically made inactive in the group.
• Automatically go active 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 into the management interface. If unchecked, agents will need to manually set their active status across their various groups.

Custom Fields

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

Tickets

Use this tab to edit the following settings regarding the employee's abilty to use a external email client or application to handle tickets.

• 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.
• Max Tickets - The maximum number of new, active tickets an agent can have at a time. This field applies to the overall tickets an employee has and is not specific to any groups. Group Max Tickets may still be applied; however, the overall Max Tickets value will override. For example, if the overall Max Tickets is set at 10 and a group’s Max Tickets is set at 15, the employee will only be automatically assigned 10 tickets. When configuring this field, take into account the number of groups an agent is part of and the sum number of max tickets they should generally receive from those groups. 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.

Live Chat

Use this tab to edit the following settings regarding the handling of 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.
• 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 a sound when a chat message is received. By default, this option is enabled.
• 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.
• Block chat while composing call logs - Checking this box will block live chats from popping up while an active agent is composing a call log.

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. Thererore, if a custom role is created, the permissions assigned to all roles for 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 because the Everyone role applies to everyone that interacts with SmarterTrack, both agents and end users, and because the Agent role 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, and view articles and 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, in any department where they belong to at least one group. Note: Managers must also have the agent role enabled.

• Administrator - An administrator has access to every area of the SmarterTrack installation: the system settings, management interface and database information, all tickets, live chats, call logs and tasks, all Community categories, Brands and reports. 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 at least one 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 Users can also have Community privileges such as editing posts, deleting posts, etc. However, system administrators may want to limit the Community access this role has so as to limit the potential for abuse of Community topics.

• 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. This role also has Community privileges that can be extended by system administrators as these users have verified their contact email addresses.

To access this section, log into the management interface with an administrator account. Then click on the Settings icon. In the Manage area of the navigation pane, click on Roles . The default and custom roles associated to your company will load in the content pane.

In general, the following columns are available:

• Checkbox - Use these boxes to select multiple roles. Roles 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 users (customers).
• Users - The number of SmarterTrack users assigned to the role.
• Custom Role - Indicates with a checkmark whether the role was created by the administrator to meet specific company needs. Predefined Roles will NOT have a checkmark in this column.

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).

Editing Roles

To view the configuration of 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 feature permissions for the role. The items shown will vary based on whether the role is available for Users or Employees. Items with an asterisk (*) are specifically for Employee Roles.

- 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.
- Survey* - To specify how much control an employee has over the ability to view survey details, select the appropriate option from this list.
- Community - To specify how much control an employee has over the management, moderation and interaction with the Community, select the appropriate option from this list.

- Users/Organizations* - To specify how much control an employee has over the creation and management of users and organizations, select the appropriate option from this list.

Feature Permissions

Each feature has its own permission set. There are standard permissions as well as a Custom setting. The Custom setting allows an administrator to apply a more granular set of permissions for the feature to the Role. Therefore, when Custom permissions are selected, the Tab for that specific feature is made active and the administrator can click on that tab and set the permission detail as needed. The standard permissions available for both Users and Employees include:

- Full Control - Gives the Role complete control over the feature. This includes things like creating new items, editing items, deleting items, etc.
- Modify - Gives the Role the ability to change something in the feature, such as clear Helpfulness Ratings for KB articles.
- Read Only - Gives the Role only the ability to read an item -- not create, modify, edit or delete it.
- None - Removes the Feature from the Role entirely.
- Custom - Allows the admininstrator to set a granular level of permissions to that feature for a specific Role. For example, if a System Administrator wants to limit the ability for the Agent role to transfer things like tickets and live chats, they'd set the Agent Role permissions for Distribution to Custom, then edit the Distribution tab and remove (uncheck) the Agent Role's ability to "Transfer Work Items" and "Transfer WOrk Itmes to Specific Agent". Custom permissions can be set for any feature available in SmarterTrack.

User and Employee Feature Permissions

There are a few Roles that are shared by both Users and Employees. These Roles, while spanning both, do offer some different permissions types based on who the Role is created for. Below, we've listed these shared Roles, and any permission that is exclusively for Employees is in bold . For Custom permissions, those are listed as well.

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 following:

- Full Control

- Create
- Delete
- Edit
- Move
- Copy
- Transfer
- Clone
- Mark - Public, Private, Draft, Reviewed, Review
- Add Feedback
- Clear Helpfulness
- Review
- Event
- Scan Broken Links
- Modify -- Also controls the ability for agents to "Clear Helpfulness".

- Create
- Delete
- Edit
- Move
- Copy
- Transfer
- Clone
- Mark - Public, Private, Draft, Reviewed, Review
- Add Feedback
- Scan Broken Links
- Read Only

- Scan Broken Links
- None
- Custom

- Create - Create new KB articles.
- Modify - Essentially edit KB articles, including the ability to clear Helpfulnees ratings and feedback.
- Delete
- Review - KBs can be marked as "Needs Review". This permission gives the Agent the ability to remove that Review flag.
- View

As an aside, if multiple KB folders are available, permissions can be set and/or modified on a per folder basis.

KB Comments

Use this tab to specify knowledge base commenting permissions for this role. These permission cover both the Portal as well as the Management Interface, where applicable. (E.g., it's possible to reply to a comment from the Portal as well as from the Management Interface.) Note: This tab is only available if the administrator selects custom KB comment permissions in the options tab. Knowledge base feedback permissions cover the following:

- Full Control

- Create
- Reply
- Edit
- Delete
- Report/Moderate
- Modify

- Create
- Reply
- Report/Moderate
- Read Only

- Report - Portal only
- None

- Report - Portal only
- Custom

- Create (login required)
- Reply
- Edit personal (login required)
- Edit all feedback (login required)
- Delete personal (login required)
- Delete all feedback (login required)
- Moderate (login required)

Specific User Roles will have extended permissions. For example, the Registered User with Verified Email Role has different, more expanded permissions than the Everyone Role. This is because a User who has registered an account within the Portal, and who than has their email address verified, can be someone who has expanded permissions by the help desk staff. For example, these users can act as Moderators for the KB system or the Community.

Community

Use this tab to specify community permissions for this role. Note: This tab is only available if the administrator selects custom community permissions in the options tab. Community permissions cover the role's ability to:

- Full Control

- Create Thread
- Edit Thread
- Delete Thread
- Create Post
- Edit Post
- Delete Post
- Most Post
- Report
- Read Only

- Create Thread
- Create Post
- Report
- Custom

- Moderate
- Edit all Posts
- Delete any Post
- Change Status

Employee Only Feature Permissions

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:

- Full Control

• Create
• Edit
• Delete
• Mark Public
• Mark Private
• Mark Draft
• Mark Reviewed
• Mark for Review
• Scan Broken Links
• Clone
• Modify

• Create
• Edit
• Mark Public
• Mark Private
• Mark Draft
• Mark Reviewed
• Mark for Review
• Scan Broken Links
• Clone
• Read Only

• Scan Broken Links
• None
• Custom

• Create - Create News articles.
• Modify - Essentially edit KB articles, including the ability to clear Helpfulnees ratings and feedback.
• Delete
• Review - News items can be marked as "Needs Review". This permission gives the Agent the ability to remove that Review flag.
• View

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:

- Full Control

- Create
- Reply
- Take
- Delete
- Transfer
- Merge
- Change Status
- Change Priority
- Change Email Address
- Change Subject
- Pin
- Follow-up
- Assistance
- Add Comment
- Add Resolution
- Add Attachment
- Add Related Item
- Add Task
- Add Time Log
- Add Call Log
- Advanced Search
- Access the Queue
- Modify

- Create
- Reply
- Merge
- Change Status
- Change Priority
- Change Email Address
- Change Subject
- Pin
- Follow-up
- Assistance

- Add Comment
- Add Resolution
- Add Attachment
- Add Related Item
- Add Task
- Add Time Log
- Add Call Log
- Custom

- Mark as Deleted
- View Queue -- This would limit the agent's ability to see the Queue, and would only see tickets assigned to them via Round Robin distribution.

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:

- Full Control

- Create
- Delete
- Transfer
- Edit
- Change Status
- Change Priority
- Event
- Advanced Search
- Task Scheduler
- Modify

- Create
- Edit
- Change Status
- Change Priority
- Advanced Search
- Task Scheduler
- Read Only

- Advanced Search
- None
- Custom

- Create
- Modify
- Delete
- Change Start and Due Dates

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:

- Full Control

- Create
- Delete
- Transfer
- Edit
- Add Attachment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Assistance
- Events
- Advanced Search
- Modify

- Create
- Edit
- Add Attachment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Assistance

- Advanced Search
- Read Only

- Assistance
- Advanced Search
- None
- Custom

- Create
- Modify
- Delete

Live Chats

- Full Control

- Take
- Transfer
- Add Comment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Manual Event
- Assistance
- Instant Messages
- Chat Rooms
- View the Queue
- Advanced Search
- Modify

- Take
- Add Comment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Instant Messages
- Chat Rooms
- View the Queue

- Advanced Search
- None

- Add Comment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Advanced Search
- Custom

- Participate in Instant Messages
- Participate in Chat Rooms
- Create and Edit Chat Rooms -- This permission requires "Participate in Chat Rooms" before it can be activated for an agent.
- View Queue

Use this tab to specify "internal" live chat options for Instant Messaging and agent Chat Rooms

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.

- Full Control

- Live Chat
- None
- Custom

- View Who's On Visitors

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.

- Full Control

- Create Custom
- Delete Custom

- Edit Custom
- Schedule Email
- Email
- Print
- None
- Custom

- View specific reports -- Each report is listed, and administrators can grant or revoke permissions to view each as needed.

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:

- Full Control

- Can do Transfers
- None
- Custom

- 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. Requires "Transfer Work Items" before it can be activated for an agent.
- Manage Agent 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:

- Full Control

- Create
- Edit
- Delete

- None
- Custom

- Create and Edit My Events
- Trigger system-level manual events

Surveys

Use this tab to specify survey permissions for this role. Note: This tab is only available if the administrator selects custom survey permissions in the options tab. Survey permissions cover the role's ability to:

- Full Control

- Can View
- None
- Custom

- View Summary - Allows the role to see the Survey tab for tickets and live chats. It also will allow agents to see the survey stars on tickets and live chats, and on the User Details Survey and Users/Orgs Survey tabs. It will also allow them to see the Reports > Surveys > By Brand, By Agent, and By Survey survey reports. (IF they have access to the Reports.)
- View Details - Allows the role to view the complete survey results everywhere they see survey stars / survey entries in a grid. (Requires "View Summary" before it can be activated for an agent.) However, they'll only have access to view the Reports > Surveys> By Brand, By Agent, and By Survey reports ONLY if they have permission to view at least one Survey Report.

Users / Organization

Use this tab to specify user and organization permissions for this role. Note: This tab is only available if the administrator selects custom user / organization permissions in the options tab. User / Organization permissions cover the role's ability to:

- Full Control

- Create User/Organization
- Edit User/Organization
- Delete User/Organization
- Clone User
- Add User Comment
- Add User Ticket
- Add User Call Log

- Add Organization Comment
- Add Organization Call Log
- Create Organization Member
- Edit Organization Member
- Delete Organization Member
- Modify

- Create User/Organization
- Edit User/Organization
- Delete Organization
- Clone User
- Add User Comment
- Add User Ticket
- Add User Call Log
- Add Organization Comment
- Add Organization Call Log
- Create Organization Member
- Edit Organization Member
- Delete Organization Member
- Read Only

- Add User Ticket
- Add User Call Log
- Can View Organizations
- Custom

- Edit a user's profile
- Create and Edit organizations
- Add and Edit organization users
- Create a user's profile
- Delete a user's profile

Custom Roles

System Administrators have the ability to create "Custom Roles" for either end users or employees. Custom roles can be extremely useful for things such as adding responsibility to users. For example, if your Community is especially popular, you may want to assign some users moderation roles. This new custom role could allow these users to edit posts, delete posts, report abuse, etc. However, to do this they'd need a custom role. For information on how to create roles, please see the SmarterTrack area of the SmarterTools Knowledge Base .

Licensing

These settings are not available to those using the Hosted SmarterTrack Helpdesk.

To access licensing information for SmarterTrack, log into the management interface with an administrator account. Then click on the Settings icon . In the Configuration area of the navigation pane, click on Language and Locale . The edition, status, upgrade protection expiration date and license level information will load in the content pane.

The following options are available from the content pane toolbar:

- Activate - Activates a new SmarterTrack license key.
- Reactivate - Reactivates a SmarterTrack license key.
- Details - Displays details about the license, including license key, feature, status, upgrade protection expiration, limits and available trials. License details can also be seen by double-clicking on the license.
- Buy Now - Allows the administrator to purchase a new license key.