



# Configuration

Help Documentation

# Configuration

## Connected Services

Administrators will use this section to manage any services and applications that are connected to the SmarterTrack installation, including live chat translations, external feeds, ticket transferring across SmarterTrack instances and more. To access this section, 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 Connected Services . The settings will load in the content pane and the following tabs will be available:

## Integrations

Use this tab to edit the following settings:

- Max External Feed Articles - The number of articles that will be displayed per external feed. For example, if an external feed is configured to show blog posts on the SmarterTrack portal, only this number of articles will be displayed at a time.
- Map Provider - Using Google Maps, SmarterTrack can display customer location information in Who's On or when an IP address is clicked in a live chat. To enable a map provider, select Google from the dropdown menu.
- API Key - A Google Maps API Key IS REQUIRED in order to use Google as the map provider in SmarterTrack. Getting an API key is free, and, in most cases, using a standard API key will be fine. However, in larger installations, it may be necessary to upgrade your API key to avoid hitting the limitations applied to a standard API license from Google. For more information on obtaining an API Key, see the Get API Key page . Information about Google Maps Usage Limits is also available from the Google Maps API documentation.
- Translation Provider - Select which translation service to use from the list: Google or Azure. By default, the auto-translation method is set to None.
- API Key - For Google Translator only. The API key provided by Google. For more information on obtaining this key, please see the KB Automatically Translate Live Chats .
- Subscription Key - For Azure Translator only. A security key that allows Microsoft Translate to interact with your SmarterTrack installation. For more information on obtaining this key, please see the KB Automatically Translate Live Chats .
- Requests to Translations API - The total number of translation requests sent to the Translation Provider selected. This allows you to know how many requests sent so any limits can be protected.
- Characters to Translations API - This is the total number of characters sent to the Translation

Provider selected. This allows you to keep track of any character limitations imposed by the Translation Provider to avoid any unnecessary extra charges.

- WHMCS Username - Provide the username of an admin-level user within WHMCS who has API Access. (Used when integrating SmarterTrack with the WHMCS Addon Module .)
- WHMCS Password - Provide the password associated with the admin username. (Used when integrating SmarterTrack with the WHMCS Addon Module.)
- WHMCS API Key - This is a security feature used to authenticate the integration between SmarterTrack and WHMCS. Enter the exact API Access Key that is configured in the configuration.php file found within the WHMCS directory. For example, if the following line is present in the configuration.php file: `$api_access_key = "abc123"`, enter abc123 in this field. (Used when integrating SmarterTrack with the WHMCS Addon Module.)
- WHMCS URL - Provide the complete URL of your WHMCS control panel. (Used when integrating SmarterTrack with the WHMCS Addon Module.)

The follow options are available from the content pane toolbar:

- Save - Saves the changes made to the options on the tab.
- Test Settings - Use this button to test your translation settings with the appropriate provider.
- Reset Statistics - This button will reset the character count that is tracked for character conversions using the appropriate translation service. This can be used to check against any reports received or viewed at the translation service website to ensure both systems are in sync.

## External Feeds

External feeds allow users to have custom RSS feeds, and snippets of the information in articles or news items, displayed on their portal. External Feeds are different than Custom Links in that the feed snippet is displayed on the Portal home page as a section of the Portal. Custom Links create a new button on the Portal home page.

If any external feeds are available, they will be listed on this page. Otherwise, new feeds can be added by clicking Add in the content pane toolbar. External feeds can be associated with all brands or used and customized on a per-brand basis. Furthermore, if multiple feeds are to be displayed on a brand's portal, they will be displayed in order of how they are listed in the Connected Services settings. Use the Move column to adjust the order of the external feeds, if needed.

## SmarterTrack Connections

Administrators can use this section to connect to another SmarterTrack installation for ticket transferring. This can be useful for those organizations working out of separate locations or across sister-companies. When a SmarterTrack installation is connected, agents can choose whether to

transfer tickets to the local or connected instance. Note: Both installations must be running the same version of SmarterTrack in order for this feature to work properly.

To add a SmarterTrack instance, click Add in the content pane toolbar. A modal window will display the following options:

- Connection Name - The friendly name of the SmarterTrack instance.
- SmarterTrack Base URL - The URL for the SmarterTrack portal.
- Admin Username - A system administrator's username for the SmarterTrack instance.
- Admin Password - A system administrator's associated password for the SmarterTrack instance.

## Custom Fields

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 to require end users to supply specific pieces of information 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. These custom fields use the Data type.

- 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. These custom fields use the People type.

To access this section, 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 Custom Fields . A list of custom fields will load in the content pane and the following tabs will be available:

## Fields

Use this tab to configure the field definition. If the custom field should be available to users when submitting new tickets or live chats, the field definition will then need to be added to a template.

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 Name - The name of the custom field.
- ID - The auto-generated internal ID that can be used with Web services and External providers.
- Data Type - The format in which the custom field data is provided.
- Default Value - The value assigned to the field by default, when the field is initially created.
- Applies To - Indicates whether the custom field applies to People or Data.

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 Name - The name of the custom field.
- Applies To - Custom fields can apply to Data or People. Data custom fields will be seen on tickets, live chats and call logs. They can be filled in by agents or users (if used on a ticket or live chat template). People custom fields are used only by agents and can be seen on user accounts. See above for information on the two different types of custom fields.
- Data Type - To specify the data type (text, drop down list, date, etc.), select the appropriate option from the list.
- 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.

## 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. These fields can be added to tickets, live chats, advanced searches, reports, and system settings. Note: Specifying which template to use for tickets, live chats and call logs is done using the Custom Field Template setting in the Department settings on the Ticket, Live Chat or Call Logs tabs.

To view the details for a specific template, simply double-click the template. To create a new template, click Add in the content pane toolbar. The template details will load in a new window and the following settings will be available:

### Options tab

Use this tab to display the following setting:

- Display Name - The name of the template.

### Field Definitions tab

Use this tab to add existing field definitions to this template. 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 save or send - 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.

## Time Log Categories

While not directly related to custom fields as detailed above, time log categories add additional customization to the SmarterTrack management interface. Configured by the system administrator, time log categories are available on time logs to help managers see where an agent's time is spent or to organize tasks related to a specific project. To create a new category, simply click Add in the content pane toolbar. A Category modal window will display a field for the Category Name. Once created, time log categories are available to use immediately.

## Email

Administrators will use this section to specify the settings relating to email delivery, including POP importing, SMTP accounts, autoresponders, email templates and more.

To access this section, 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 Email . The email settings will load in the content pane and the following tabs will be available:

## Options

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.
- Delete Raw Content After - To specify the values at which raw content should be deleted, type the appropriate number in the fields for days, files, and MB.
- Day(s) - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.
- File(s) - 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.
- MB - 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.
- Delivery Delay - To specify the number of seconds automated messages from the system are delayed, type the appropriate number in this field. Setting a delivery delay can keep the connection between your help desk and your mail server running smoothly. By default, the

delivery delay is 10 seconds.

- Automated Email Blacklist - Any email address or domain you add to this text box will be excluded from receiving any departmental auto-responders or any automated emails sent by SmarterTrack. This includes emails like ticket received notifications, surveys, emails generated from Events, etc. Addresses/domains should be entered one per line.
- Filter duplicate incoming emails - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.
- Remove redundant embedded replies in emails - Checking this box will truncate emails by removing redundant embedded replies. For example, sometimes replies from users can contain multiple copies of previous conversations between that user and the agent. Checking this box removes most, if not all, of that "redundant" content to keep replies shorter, less wieldy, and easier to read and follow.

## SMTP

SmarterTrack does not utilize an internal SMTP server to send email messages. Therefore, an external SMTP account must be configured to send ticket responses and system notifications. Accounts configured in this section can be chosen in the Brand and Department settings. By default, a Default SMTP Account will be present. Edit the account or click Add in the content pane toolbar to configure the SMTP settings. A modal window will display the following options:

- Server - The outgoing SMTP server name.
- Email Address - The email address from which 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.

## POP

POP accounts can be used to import tickets from email. Note: If using a POP server for email, any messages in the account will be downloaded into SmarterTrack and deleted from the mail server. To add a POP account, click Add in the content pane toolbar. A modal window will display the following options:



- Server - The outgoing POP server name on which the email account resides.
- Encryption - Select the level of security used for receiving emails: None, SSL, or TLS.
- 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 automatically change to the default port necessary to match the security setting.
- Login Username - The identifier used to log into the POP server.
- Login Password - The corresponding password used to log into the POP server.
- Email Address - The full email address associated with the POP account. Some mail servers offer the ability for the Username to be different than the actual email address, or don't allow the full address as the Username. To ensure the proper account is used for POP importing, both the Username and Email Address need to be added when setting up a POP account.
- Import Frequency - The interval, in minutes, that SmarterTrack checks the POP account for new messages. By default, the import frequency is 2 minutes.
- Department - The department that will utilize the POP settings for ticket importing.
- Able to Start Tickets - The role required to submit a ticket via email. For more information, see Roles .
- Leave Messages on Server - By default, when you retrieve email through POP3, the emails are deleted from the mail server. Checking this will cause email messages retrieved via POP to stay on the mail server.

Note: When importing emails, the department autoresponder will not be sent for emails more than 3 days old.

## 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. Each template is sent using the Brand SMTP settings. See below for more information on the available templates:

### **-Master Template-**

This template is used to control the outer HTML appearance of emails sent from SmarterTrack. An HTML and Preview tab are available to edit the HTML and view what the HTML will render in outgoing emails. No variables are available for this template.

### **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:

- Ticket Number - The ticket number assigned to the closed ticket. [%TICKETNUMBER%]
- Subject - The Subject of the closed ticket. [%SUBJECT%]
- Date - The date the ticket was closed. [%DATE%]
- Current Time - The time the ticket was automatically closed. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Community Activity Digest**

This email is sent on a regular basis and is used to notify the customer of activity on Community threads they are subscribed to. The following variables are available:

- Activity Summary List - A summary list of all Community activity that the user is subscribed to [%COMMUNITYACTIVITYLIST%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Community Conversation Notification**

This email is used to notify a customer that a message was sent to them from another Portal user. The following variables are available:

- Username - The username of the person sending the message. [%USERFROM%]
- Comment - The text/comment that was sent. [%MESSAGETEXT%]
- URL - A link to the user's profile. [%PROFILEURL%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Community Post Moved Notification**

This email is used to notify a customer that a post they created was moved to a new Thread. The following variables are available:

- New Subject - The new post subject, if it was changed. [%NEWSUBJECT%]
- Subject - The post's original subject. [%OLDSUBJECT%]
- Post - The full text of the original post. [%POSTTEXT%]
- Username - The username of the person creating the post. [%USERNAME%]
- URL - A link to the user's profile. [%PROFILEURL%]
- Date - The date (on the server) the activity happened. [%DATE%]
- Current Time - The time (on the server) the activity happened. [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **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:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Ticket Number - The ticket number assigned to the rejected ticket. [%TICKETNUMBER%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **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 Roles . The following variables are available:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **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 a POP account is not enabled for the department.

Instead, tickets need to be created via the Web portal. For more information, see Email . The following variables are available:

- Subject - The subject of the email that came in. [%SUBJECT%]
- Email Address - The email address of the original sender. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **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:

- Base URL - The full URL to the portal. [%SITEURL%]
- Username - The username of the account requesting the password reset. [%USERNAME%]
- Password - The password of the account (required). [%PASSWORD%]
- Change Password URL - The URL the user clicks on that will allow them to reset their password. [%CHANGEPASSWORDURL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Survey**

This template is used to offer a survey to a customer after their ticket is resolved. The following variable is available:

- Ticket Number - The ticket number the customer will use as a reference for the survey.  
[%TicketNumber%]
- Subject - The subject of the resolved ticket. [%Subject%]
- Survey Hyperlink - A link to the survey that the customer can click to go to the actual survey.  
[%SURVEYURL%]
- Survey HREF - The text link set up for the survey. This is then used in place of the Survey Hyperlink to provide a friendly text string to click versus a long URL. [%SURVEYHREF%]
- Customer Name - The customer's display name. [%CUSTOMERNAME%]
- Customer Username - The username of the customer. [%CUSTOMERUSERNAME%]
- Date - The current date (on the server). [%DATE%]

- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Ticket List**

This template is used when a customer requests an emailed list of all previous tickets. The following variable is available:

- All Tickets - All Tickets that belong to user. [%ICKETLIST%]
- Email Address - The email address associated to the tickets. [%EMAIL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

### **Verify Email Address**

This template is used to confirm a new user's email address. The following variables are available:

- Username - The username on the account, [%USERNAME%]
- Full Name - The full name for the user signing up, [%FullName%]
- Email Address - The email address on the account, [%EMAIL%]
- Link - The link they need to click on to verify the account (Required). [%LINK%]
- URL - The full URL that needs to be clicked. [%URL%]
- Date - The current date (on the server). [%DATE%]
- Current Time - The current time (on the server). [%TIME%]
- Brand Name - Company name as defined in brand settings. [%COMPANY%]
- Portal Url - The URL of the customer portal. [%PORTALURL%]

## **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. 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. For more information on agent-level events, please see [My 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 system-level events, 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 [Events](#) . A list of configured events will load in the content pane and the following tabs will be available:

## Global

System-level events configured in this section can apply to the entire SmarterTrack installation. 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 not. 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 event 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](#) .

## Employees

This tab displays all events that were created by individual employees. Administrators will want to look at these events occasionally to ensure that employees are using the event system correctly and productively. To view or modify the settings for an agent's event, double-click the event and the event settings will load in the content pane.

## Notification Profiles

Notification profiles determine how event messages are sent. Options include text message or email. System administrators can modify the default notification profile or create additional ones using the

New button in the content pane toolbar. System-level notification profile(s) can be used when an event does not apply to a specific agent but the installation a whole.

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:

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

## Forms

This feature is only available to administrators using SmarterTrack Enterprise.

While it's possible to create custom ticket and live chat templates that can be used to collect certain types of data from customers PRIOR to a ticket or live chat being submitted, there's a balance that needs to be found. That balance teeters on asking customers to provide too much or too little information. You don't want to overwhelm customers with fields when they first contact you, but you also need some types of information in order to properly triage issues or questions. That's where SmarterTrack Forms come into play.

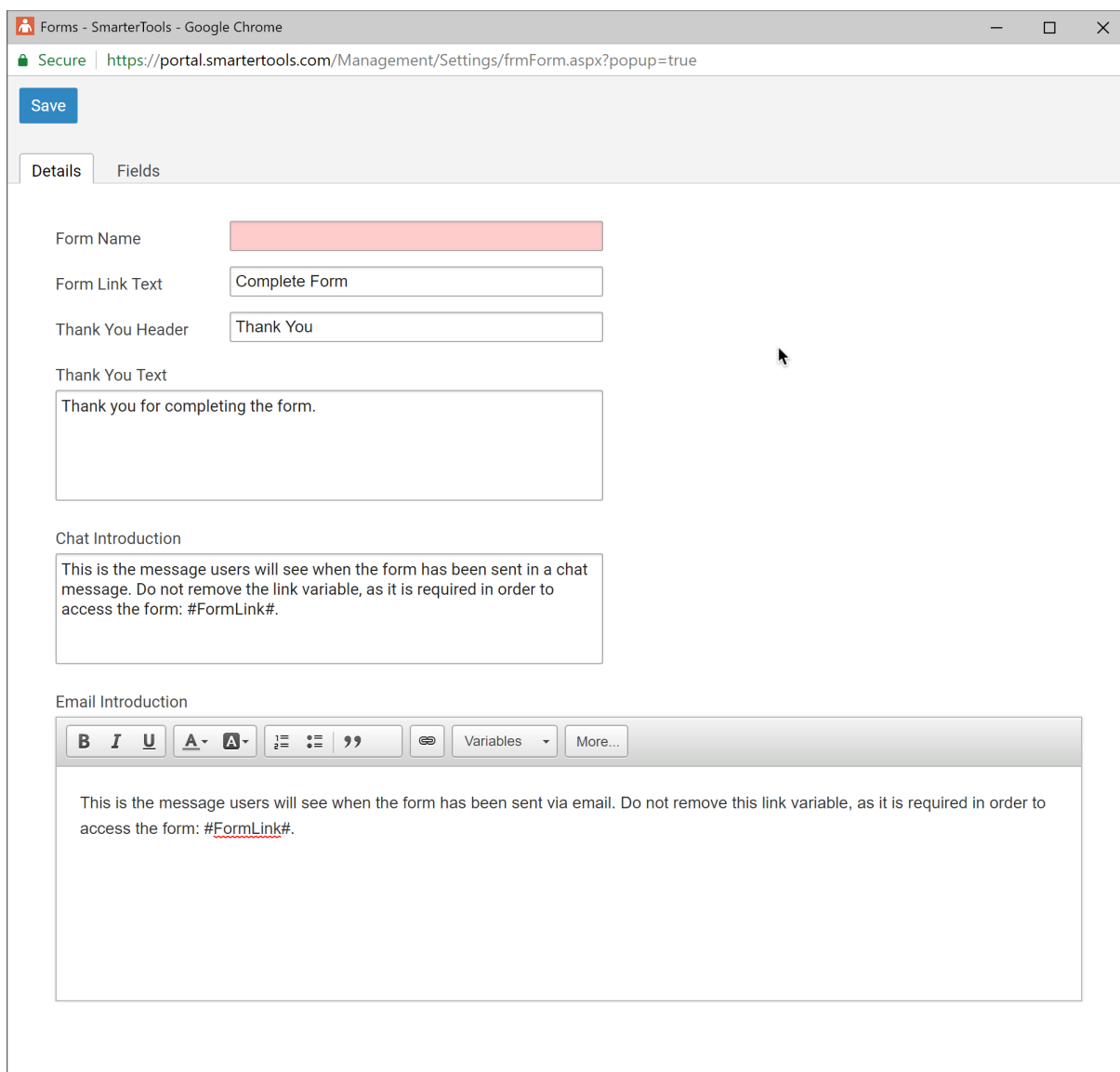
Forms can be used for any number of things: gathering system information; gathering access information for remotely accessing a customer's network; gathering product serial numbers or part numbers and more. That said, a form can only be filled out once. If information is missing or filled out incorrectly, a new form will need to be sent to the user.

To view or manage forms in the system, log into the management interface with a system administrator account. Then navigate to the Settings section. In the Configuration area of the navigation pane, click on Forms. The settings will load in the content pane and the following buttons will be available:

- New - Allows you to create a new form.
- Actions - Lists the Select All and Delete actions.

## Creating a Form

Just as with Surveys, it's up to System Administrators to create new forms. To do this, click the New button. When you do this, a new pop-out window opens:



The screenshot shows a browser window titled "Forms - SmarterTools - Google Chrome" with the URL <https://portal.smartertools.com/Management/Settings/frmForm.aspx?popup=true>. The interface has a "Save" button in the top left. Below it are two tabs: "Details" (selected) and "Fields". The "Details" tab contains several form fields:

- Form Name:** A text input field with a red border.
- Form Link Text:** A text input field containing "Complete Form".
- Thank You Header:** A text input field containing "Thank You".
- Thank You Text:** A text area containing "Thank you for completing the form."
- Chat Introduction:** A text area containing "This is the message users will see when the form has been sent in a chat message. Do not remove the link variable, as it is required in order to access the form: #FormLink#."
- Email Introduction:** A rich text editor with a toolbar (Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Quote, Link, Variables, More...) and a text area containing "This is the message users will see when the form has been sent via email. Do not remove this link variable, as it is required in order to access the form: #FormLink#."

In the new window, two tabs appear: Details and Fields.

### Details

This tab displays fields to fill out for general information about the form, as well as the messages users will see when the form is sent to them to be filled out. There is some default text in certain areas, but it can easily be replaced or customized as needed.



- Form Name - The friendly name of the form as it appears in the forms list.
- Form Link Text - The link text you want the user to see, to entice them to click the link. For example, "New User Setup Information" or "New Vendor Registration Form". This is the text used by the #FormLink# variable that's included with the email and chat introduction text.
- Thank You Header - The text that appears at the top of the page that's displayed once a user fills out the form.
- Thank You Text - The full text that appears on the "Thank You" page that appears once a user fills out the form.
- Chat Introduction - This is the text that appears when a form is introduced via live chat. Generally, this text should be short and to-the-point, so the text box is basic, without customization options. The "Form Link Text" that's set will appear within the introduction. Therefore, the #FormLink# variable MUST be included somewhere within this text.
- Email Introduction - This is the email that will be sent to users when the form is requested. This text can be longer and more stylized as it's sent as a reply to the ticket. Just as with the Chat Introduction, the "Form Link Text" that's set will need to appear somewhere within this text using the #FormLink# variable.

## **Fields**

Fields are, essentially, the questions you want to ask, items you want to collect, etc. Form fields are like survey questions: you add the items you want to collect and arrange them on the page in the order you want the information collected. In many ways, the field types match the survey question types you can create.

To add a field, click the Add Field button. A modal window will open and the following options are displayed:

- Field Type - This is the type of box you want to create to have filled out by the user. Field types include:
  - Header - Text that will appear on the form as a <h2> header.
  - Informational - Text that will appear as a label on the form. This is, more or less, introductory text that is not filled out by the user.
  - Multiple Selection - Allows users to select one or more options from a list.
  - Single Selection - Allows users to select one option from a list.
  - Short Response - Allows users to enter a small amount of text in response to your question or statement.
  - Long Response - Allows users to enter a larger amount of text in response to your question or statement.

- Yes / No - Allows users to select yes or no in response to your question.
- Checkbox - Allows user to checkmark a statement or question. For example, this could be used to gather consent. ("I accept the Terms and Conditions as outlined in this form.")
- Email Address - Allows users to enter a valid email address.
- Link - Creates a text box where users can input URLs to websites or individual web pages.

Depending on the Field Type you select, options will appear that will allow you to customize the question, or data point, so you can collect the information you want. Once you have everything set up, be sure to save your new form.

## **Sending a Form**

As mentioned, forms can be sent to users either via Live Chat or as a reply to a ticket. However, the options for sending a form as a chat reply versus a ticket reply are slightly different.

### **Sending a Form Via Live Chat**

When sending a form as part of a live chat, simply click the Actions (...) button and select "Send Form" from the dropdown. This will paste the Chat Introduction text as a reply to the chat, along with the Form Link Text. The user simply clicks that link to open the form in a new window.

### **Sending a Form as a Ticket Reply**

When sending a form as a reply to a ticket, Agents have the ability to modify the Email Introduction text, if necessary. Unlike the Chat Introduction, having the ability to edit the Email Introduction is a benefit for agents when replying to tickets. This is because they may want to modify, or personalize the Email Introduction based on any ongoing or previous conversations they've been having with the end user. Crafting Email Introduction text that is viable across many different circumstances is difficult, at best, for a system administrator. Therefore, giving agents the ability to customize the text ensures that the rapport the agent has with the end user is preserved.

Just as with live chats, when an agent is replying to a ticket, they click the Actions (...) button and select Send Form from the dropdown. This opens a reply window and pastes the Email Introduction text as the agent's reply, complete with Form Link Text. The agent can then simply send the reply, and set the appropriate status on that reply, or edit the introduction text before sending the reply.

Regarding ticket status once a form is sent, a completed form will always place the ticket the form is associated with back to an Active status. (Tickets that are Closed and Locked retain that status, even if a form is filled out.) In addition, a comment is added to the ticket denoting the date and time the form was completed, and the Forms tab will display a number on it, noting that there is a new completed form associated with the ticket. The agent can then go to that tab and click the Form link to view the form.

## Failover

This feature is only available to administrators using SmarterTrack Enterprise with Failover 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. For more information on Failover, including complete configuration instructions, please see SmarterTrack Failover Functionality .

To view the failover settings within 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 Failover . 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 location 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.

## Language and Locale

Administrators will use this section to adjust any language and locale settings, including time zone, location, support for multiple languages and translatable strings.

To access this section, 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 settings will load in the content pane and the following tabs will be available:

### Options

Use this tab to edit the following settings:

- **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) (\$1,000.00).
- **Default Time Zone** - From the list, select the time zone SmarterTrack will use as the default. 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.

### 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 [Set Up SmarterTrack to Support Multiple Languages](#) .

The following columns are available in the content pane:

- **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 Installed** - Indicates whether the language pack has been installed into SmarterTrack.

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 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.)

The following columns are displayed when translatable strings have been added:

- 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.

To edit the settings for a specific translatable string, simply double-click the translatable string. A modal window will display the following options:

- Token Name - The identifier for the translatable string.
- Description - A summary describing the purpose of the translatable string.
- For each supported language that is configured, a field will be available for translation.

## Live Chat

SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, improve customer support and assist more customers concurrently. Administrators will use this section to adjust the general live chat settings for the installation, including quality control settings, notification settings, department permissions and settings, and live chat link integration.

NOTE: SmarterTrack's live chat functionality uses jQuery 3.5.1 for communication between a website using the live chat embed code and SmarterTrack itself. If the website utilizing the embed code also uses jQuery for any JavaScript plug-ins or similar, there could be compatibility issues if those use a jQuery version lower than 3.0. In order to ensure that live chat and the website itself work as expected, jQuery should be updated to at least jQuery 3.0. The embed code accesses jQuery from within the script itself, so if the website does NOT use jQuery, nothing needs to be done. The same holds true if a version of jQuery above 3.5.1 is being used on the site.

To access this section, 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 Live Chat . 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:

- Hand-off - 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.
- Hand-off - 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.
- Hand-off - agent disconnected - 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.
- Disallow new chats 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 business hours for the brand or department.
- Allow end users to send attachments - Check this box to allow users to send files (screenshots, documents, etc.) to agents via live chat. By default, this option is disabled. To limit the file types Users can upload, go to Configuration > Security and click on the Uploads tab. Here you can add extensions to the Allowed extensions for end user file uploads (one per line) text box. (E.g., .DOCX, .JPG, .PDF, etc.)
- Warn agents if they are the last to go inactive for chat - Checking this box will display a confirmation box to the last agent to log out of a department or group letting them know, and having them acknowledge, that they are the last agent to log out.

## Notifications

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 sound - How often a sound warns agents that they have a live chat that has not been responded to. The threshold for when the warning sound begins is determined by the 'after' field.
- Idle critical sound - How often a sound notifies agents that a chat has not been responded to and has reached the critical idle threshold. The critical idle threshold is determined by the 'after' field.
- Duration warning - The number of seconds or minutes a chat lasts before its duration sets off a warning.
- Duration critical - The number of seconds or minutes a chat lasts before its duration sets off a critical alert.

## Live Chat Links

Use this tab to stylize how live chat appear on the customer portal and how live chat appears when added to a company website using Website Integration. These links and/or images can be used to spawn SmarterTrack live chats wherever the links and/or images are placed.

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 content pane toolbar.
- Title - The name of the live chat link.
- Type - The type of live chat link: an Embedded link, displayed as an image or horizontal tab (with custom text), that opens a chat window directly within the site or a Button link, displayed as an image or plain text, that opens its own chat window when clicked.
- Refresh Rate - Indicator of the number of seconds after which the script checks the SmarterTrack server to make sure SmarterTrack is responding and live chat is available.

To create a new live chat link, click Add in the content pane toolbar. To edit an existing live chat link, simply double-click the link. The settings will load in a modal window and the following tabs will be available:

### Options tab

Use this tab to edit how the live chat window appears, the location of the live chat image/tab, how live chats are displayed and the Departments available when someone starts a chat. The following settings are available:

- Title - The name used to identify the live chat link you're generating. The title 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.

- **Position** - Determines where the live chat link will be displayed on the website: Bottom Right, Bottom Left, Top Right or Top Left.
- **Background Color** - The color in which the live chat window will be displayed. Note: The text color will automatically adjust to be visible based on the color chosen for the background.
- **Style** - SmarterTrack includes standard live chat styles for determining how chat conversations are displayed. Select one of the styles by previewing it in the preview window to the right of the live chat settings.
- **Departments to Include** - If there are multiple departments created within SmarterTrack, it is possible to select which department(s) will be available for live chat when using the live chat script.

### **Live Chat Online tab**

Making changes on this tab will be displayed to the right of the various settings, making easy to see how the changes you make will appear on the portal and/or any website that uses the live chat link.

Use this tab to edit the following settings:

- **Display As** - Select how the live chat link will be displayed when live chat is online. Live chat links can be displayed as an Image or Tab. In addition, varying settings will display based on the selection made here.
- **Header Text** - When using a Tab for your live chat display, this is the text that appears in the tab's header.
- **Anchor Title** - The text displayed when a visitor's mouse pointer hovers over the live chat online link. This text is also available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.
- **Chat Introduction** - The chat introduction is text that will be displayed above the live chat image or link for new visitor sessions to invite visitors to participate in a live chat. Note: This setting is only visible for embedded-type live chat links.
- **Tab Color** - When displaying live chat as a tab, this is the tab's color.
- **Image** - The image displayed when live chat is online. Administrators can link to an image hosted publically, upload their own image or choose from a variety of pre-made options.

### **Live Chat Offline tab**

Use this tab to edit the following settings when live chat is offline. The primary difference between Online and Offline is that there is an option to hide the live chat link when chat is offline. Apart from this, the settings are the same:



- **Display As** - Select how the live chat link will be displayed when live chat is online. Live chat links can be displayed as an Image or Tab. In addition, varying settings will display based on the selection made here.
- **Header Text** - When using a Tab for your live chat display, this is the text that appears in the tab's header.
- **Anchor Title** - The text displayed when a visitor's mouse pointer hovers over the live chat online link. This text is also available to search engine spiders that describes the live chat online link. Specifying the anchor title may improve SEO efforts.
- **Chat Introduction** - The chat introduction is text that will be displayed above the live chat image or link for new visitor sessions to invite visitors to participate in a live chat. Note: This setting is only visible for embedded-type live chat links.
- **Tab Color** - When displaying live chat as a tab, this is the tab's color.
- **Image** - The image displayed when live chat is online. Administrators can link to an image hosted publically, upload their own image or choose from a variety of pre-made options.

## Departments

Use this tab to adjust the live chat permissions and settings per department. Each department configured will be displayed on its own row. Select a department and click Edit in the content pane toolbar to open the department's live chat settings in a modal window. The following tabs will be available:

### Options

- **New Chats 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 to submit live chats. The live chat template specifies which fields the user should complete when submitting a live chat. For more information, see Custom Fields .
- **Auto-Delete After** - When enabled, this setting will automatically delete older live chats from the SmarterTrack database after a set number of days. Enabling this is recommended to help keep your SmarterTrack database lean and performing optimally.
- **Survey to Offer After Chat** - 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.
- **Search Knowledge Base before starting a new 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.

- Search Knowledge Base before starting a new ticket - Checking this means that when customers submit tickets via a live chat link when live chat is not available, 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.

### Custom Messages

Use this tab to create custom messages to be displayed within the live chat window:

- Not Available Message - The title text displayed on the live chat window when live chat is offline, indicating that live chat is not available.
- Before Live Chat - The title text displayed on the live chat window before a live chat has been started.
- Waiting for Live Chat - A message notifying customers of their estimated wait time to chat with an agent.
- Agent Welcome in Live Chat - The text that is displayed as the initial message from the agent to the end user. The welcome message appears after the user's initial live chat question.
- After Live Chat - The text that is displayed after a live chat has ended.
- Chat Invite Message - The text automatically inserted in the live chat invitation window when visitors are invited to live chat via Who's On.

There are also several variables that can be used in any of the above messages. These can be used to help customize the messages based on what page the user is on, what browser they're using and more.

### Website Integration

Use this tab to get the live chat link script needed to integrate SmarterTrack's live chat with your company website. NOTE: In order for live chat links (and/or Who's On links) to work on an external website, the SmarterTrack Portal must be secured with an SSL certificate.

- Live Chat Link - Use this dropdown menu to choose from the list of configured live chat links. The live chat link script will change based on which link is chosen.
- Host Header - In those instances where customers are utilizing multiple brands and have host headers setup 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.
- Control ID - This is a unique identifier for the live chat link script that is used at the location where the live chat link/image will appear on the page. You'll notice that when this is modified, the code for where live chat appears on your page is also adjusted to the change you make.
- Support HTTPS - Select this option to allow SmarterTrack to make connections over HTTPS when visitors initiate live chats.

- Put the following right before the page's ending `</body>` tag: - This is the actual script that will be placed on your website, between the main `<BODY>` HTML tags. The BODY end tag will generally be at the very bottom of the Web page's source. The code should be copied and pasted exactly as it appears, and it should be placed at the very bottom of your Web page so that the script is the LAST thing called when your website renders. This will prevent any potential issues with SmarterTrack prohibiting your website from loading when customers visit.
- Put the following on your page where you want your chat link to appear - When using a button-type live chat link, copy and paste this script in the location where you want your live chat status to appear. For embedded-type live chat links, it's recommended to put this HTML in the website's footer, if possible, as embedded-type chat link's positioning is determined by its live chat setting.

## Management Interface

Administrators will use this section to configure settings that affect the management interface of SmarterTrack, including basic settings, color scheme and CSS modifications.

To access this section, 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 Management Interface . The settings will load in the content pane and the following tabs will be available:

### Options

Use this tab to edit the following settings:

- SmarterTrack Base URL - The URL for the SmarterTrack portal.
- Enable simultaneous login to the portal and management interface - Checking this box means that when an Agent logs in to the Portal, they're automatically logged in to the Management Interface. This saves the Agent from having to log in to both separately. However, there may be times when they'll need to log in to each side -- the customer Portal and the Management Interface -- as different users. For example, testing Role permissions for the KB system, etc. When this is necessary, this setting will need to be disabled so that an Agent can log in to the Portal with one account, but still be able to log in to the Management Interface with their own account so they can work on tickets, etc. By default, this setting is disabled.
- Enable automatic time log creation - Checking this box will allow time logs to be automatically calculated and created for call logs, tickets and live chats when the agents who owns the call log, ticket or live chat has it open for at least one minute.
- Login Background - Use this option to select the background image(s) that displays on your login screen. Use the default images that come with SmarterTrack or a solid color background.
- Knowledge Base Articles and Canned Replies Stale After - The number of days before KB

articles and Canned Replies become "stale". Stale articles are still available but should probably be reviewed for accuracy and relevance. After an article is reviewed, the reviewing Agent simply needs to uncheck the Stale box and the stale date for that article resets. By default, articles are stale after 365 days.

## Security

Administrators will use this section to adjust the general settings pertaining to the security of the SmarterTrack installation, including the configuration of password requirements, IP blacklists, upload limitations and more.

To access this section, 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 Security . The settings will load in the content pane and the following tabs will be available:

- Options
- Password Requirements
- Blacklist
- Uploads
- Organization
- CSP

## Options

Use this tab to edit the following settings:

- Captcha - A CAPTCHA is a challenge-response test used to determine whether the user is human. By default, SmarterTrack requires portal visitors to pass a CAPTCHA when registering for new user accounts. In addition, successful CAPTCHA completion is required for unverified users (i.e., users without the "Registered User with Verified Email" role) when they submit new tickets or community threads. Although recommended, this feature can be turned off (set to "None") at any time by an administrator. Two different CAPTCHA options are available: the Built-in option or Google reCAPTCHA. Use of Google's solution requires an API key, and instructions on obtaining a key can be found here: <https://www.google.com/recaptcha/intro/android.html> . When the site key and secret key have been obtained, enter them in the corresponding fields. (NOTE: Google reCAPTCHA will not work in locations that have blocks on Google services/servers.)
- Enable brute force protection - For security purposes, SmarterTrack limits the number of times a User unsuccessfully attempts to log in to the customer-facing Portal. By default, Users are temporarily locked out of their account after 10 failed login attempts and will remain locked out

for 5 minutes. If needed, a System Administrator can bypass the lockout or disable this feature by disabling brute force protection.

- 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.
- Force all traffic over HTTPS - Select this option to force all SmarterTrack traffic over HTTPS. This improves SmarterTrack security by allowing all traffic to be encrypted. Prior to enabling this setting, SmarterTrack must be set up as a site in IIS and have a valid SSL certificate in place for the SmarterTrack site. Note: Administrators managing SmarterTrack on their own servers must ensure this SSL certificate is in place. However, Administrators using the Hosted SmarterTrack solution can simply enable this setting, as a secure connection is already in place on the SmarterTools servers.
- Moderate new user community posts - When checked, threads submitted in the Community by new users must be approved by moderators before showing publicly. A user is considered new until they are at least 7 days old and have at least 5 replies or comments on threads.
- Allow interface to be embedded in another site (not recommended) - At times, an administrator may wish to embed pieces of the customer facing portal (e.g.: KB articles, News items, etc) within a third-party site. This is an advanced feature that has security considerations and requires extensive HTML knowledge. Select this option to allow SmarterTrack's interface to be embedded in another site. NOTE: When this setting is enabled it overrides any changes/sources set in the frame-ancestors policy of the CSP.

## Password Requirements

Use this tab to configure the minimum password requirements for registered users.

- Minimum Password Length - The minimum number of characters the password must have.
- Require numbers - Select this option to force users to include a number in the password.
- Require uppercase letters - Select this option to force users to include a capital letter in the password.
- Require lowercase letters - Select this option to force users to include a lowercase letter in the password.
- Require symbol - Select this option to force users to include a symbol in the password.
- Require password does not match username - Select this option to ensure that the username and password do not match.
- Disable password strength for existing passwords - Select this option to allow changes to the password requirements to only affect new users or new passwords.

## Blacklist

Use this tab to edit the following setting:

- IP Blacklist (one per line) - Adding IP addresses to this list prevents users from that IP from being able to leave feedback for any knowledge base articles. Only one IP address may be listed on a line.

## Uploads

Use this to specify the types of files that can be uploaded to SmarterTrack. (NOTE: By default, the maximum size allowed for any attachments is 2MB.)

- Allowed extensions for document uploads in HTML editor (one per line) - These are the file types that agents can attach to tickets, live chats, knowledge base articles, etc. In general, agents should be able to attach any file type. To allow this, simply add a wildcard, which is a "dot asterisk" (\*.\*). However, there may be times when System 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 or starting live chats, either from the portal or from the custom integration of Live Chat into your own website. This list also impacts attachments to tickets that are started from, or replied to, via email. If an incoming email has a disallowed attachment type, a comment is automatically added to the ticket so that the agent knows something is missing. 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).

## Organization

### Organization Restricted Domains (one per line)

When creating an Organization, it's possible to add new Members to that organization simply by referencing a domain name. However, there are many times when customers will use free email services such as Gmail or Yahoo! when they register. Therefore, when adding new Members by domain, administrators will want to exclude free email services when adding Members by Domain. This will ensure that not ALL users of Gmail, for example, are added as Members to any specific Organization.

Therefore, by default, SmarterTrack blocks the domains listed on this page from being used when

adding in Members by Domain. This list is fully editable by System Administrators and can be amended as needed.

## CSP

The Content Security Policy (CSP) is a computer security standard that was introduced to help prevent specific types of cross-site scripting (XSS) exploits, clickjacking and other types of code injection attacks. Most web applications have a CSP built-in, with little opportunity for administrators to manage the policy without making code-level changes. SmarterTrack, however, allows experienced administrators to add things to SmarterTrack's CSP to expand on its functionality. For example, adding in the ability to embed videos, fonts or scripts from third-party services. These are normally blocked by an application's CSP as it can lead to pages being hijacked to embed, and therefore execute, malicious code.

NOTE: It is strongly recommended that this page be left untouched, except by an administrator or experienced web professional. There are some entries by default, which cannot be removed, but any additions to any areas should be made very carefully to avoid any potential security issues.

### Policy Directives and Sources

Each text box represents a specific "policy directive" within the CSP. Policy Directives describe the policy for a specific resource type and each has one or more allowed sources. The editable policy directive, its description and the uneditable default sources are listed below. Each policy can have one or more source, and each source should be on its own line.

#### **connect-src**

This policy dictates which URLs are able to be loaded via script interfaces. For example, SmarterTrack allows users to add in their Google Analytics Site ID to track usage of their SmarterTrack Portal. SmarterTrack uses the <script> tag to load the Google Analytics tracking code, including that Site ID. Therefore, the URL for Google Analytics is needed to allow that to happen.

Wildcards are allowed and the default sources are:

- \*.google-analytics.com
- googleapis.com

#### **frame-ancestors**

This policy specifies valid "parent URLs" that may embed a page in a frame, iframe, etc. Wildcards are allowed and there are no default sources.

**frame-src**

This policy specifies valid sources for nested content that are loaded via frames, etc. This content can include embedded videos for KB articles, etc. Wildcards are allowed and the default sources are:

- \*.fleeq.io
- \*.google.com/recaptcha/
- \*.mediaservices.windows.net
- \*.metacafe.com
- \*.streaming.azure.net
- \*.vimeo.com
- \*.youtube.com
- \*.youtube-nocookie.com

**script-src**

This policy specifies valid sources for JavaScript. This includes not only URLs loaded directly using a <script> tag, but also things like inline script event handlers (e.g., OnClick events) and XSLT stylesheets, which can trigger script execution. Wildcards are allowed and the default sources are:

- \*.google.com/recaptcha/
- \*.google-analytics.com
- \*.googleapis.com
- \*.gstatic.com/recaptcha/
- translate.google.com

**style-src**

This policy specifies valid sources for stylesheets. Wildcards are allowed and the default sources are:

- fonts.googleapis.com

## Surveys

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.

With SmarterTrack, business owners and managers can create different surveys for each department or a single survey that's used for the company as a whole. Separate surveys can even be created for live



chats and tickets, so questions can be crafted based on each type of interaction. Full reporting is available for managers and business owners, and agents will see their survey results displayed right on any completed ticket or live chat.

To view or manage surveys in the system, 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 Surveys . If any Surveys already exist, they'll load in the content pane, with the top most being pre-selected. It's questions are also displayed.

In general, the following details can be found on each survey in the content pane:

- 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.

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.

To create a new survey, click New in the content pane toolbar. This will open the survey editor, which the administrator will use to create the new survey. For step-by-step instructions on how to create a survey, see the KB article [Create a Survey](#) . When creating a new survey or editing an existing one, the following tabs will be available:

## Options

This tab allows the administrator to specify basic information regarding the survey. The available options are:

- Survey Name - Type the name of the survey in this field.
- Survey Link Text - This is the text that will appear at the bottom of a ticket or in an agent's signature, if these options are used.
- Thank You Text - Type a closing message in this field. This customer will see this text after successfully submitting the survey when it was opened with a link. Note: This message will not be shown for a survey taken for a Live Chat, as the window closes immediately after submission.

- Chat Introduction - - When offering a survey after a live chat, this is the text that's displayed to introduce the survey to the user.

## Questions

This tab allows administrators to create, edit or modify the order of survey questions. If the administrator 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 content pane toolbar.
- Move - Use these arrows to modify the order of survey questions.
- Question - The text of the question being asked.
- Question Type - The type of question (Yes/No, Rating, etc.).
- 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.

If the administrator is creating a new survey, questions will need to be added using the Add Question button in the toolbar. The settings shown will vary based on the Question Type chosen. The settings shown per type are listed below:

### **Short Answer**

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

### **Long Answer**

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

### **Single Selection**

- Question - The text of the question that is being asked.
- Weight - A number assigned 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. Note: You cannot associate a negative number with the weight.
- Render As - This dictates how users will see the question displayed: Radio Buttons or a Drop

Down List.

- Required Question - Check this box if users should be required to answer the question in order to complete the survey.
- Options (option : value) - Use this box to enter the options from which users can choose. Options should be listed on per line, with a value assigned to each. For example, your question may ask "How well did the agent have an understanding of the topic being discussed?" Your three options may be entered as such (one per line): "Very good understanding of topic : 10", "Mediocre understanding of topic : 5", "No understanding of topic : 1". By the values entered, you indicate that the "Very good" option has a greater positive impact on the overall survey result.

### **Multiple Selection**

- Question - The text of the question that is being asked.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.
- Options (one per line) - Use this box to enter the options from which users can choose. Options should be listed on per line.

### **Yes/No**

- Question - The text of the question that is being asked.
- Weight - A number assigned 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.
- No Value - Enter the value associated to a No answer. For example, your question may be "Did the agent have a good understanding of the topic of discussion?" Entering a value of 0 here will cause the survey score to be lower if the user chooses No.
- Yes Value - Enter the value associated to a Yes answer. For example, your question may be "Did the agent have a good understanding of the topic of discussion?" Entering a value of 1 here will cause the survey score to be higher if the user chooses Yes.
- Render As - This dictates how users will see the question displayed: Radio Buttons or a Drop Down List.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

### **Rating**

- Question - The text of the question that is being asked.
- Weight - A number assigned 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.

- Lower Limit - This is the lowest number on the rating scale.
- Upper Limit - This is the highest number on the rating scale.
- Required Question - Check this box if users should be required to answer the question in order to complete the survey.

Note: The difference between upper and lower limits cannot be greater than 20. In addition, make sure that the question is phrased so that the positive response is the higher score. (In other words, the upper limit equals the positive response and the lower limit equals the negative response.)

## Tickets

Administrators will use this section to adjust ticket settings, including those related to service quality, signatures, balancing the workload, quality control and more.

To access this section, 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 Tickets . The settings will load in the content pane and the following tabs will be available:

### Options

Use this tab to edit the following settings:

- Stop Idle Events After - Idle Events that are created, either by Agents or Administrators, run on tickets that sit, without activity, for a certain amount of time. However, these types of Events can tax SmarterTrack if there isn't an upper limit set that stops them from firing after a certain amount of time. This is especially true if more than one Idle Event is configured. Therefore, it's wise to set the number of days after which idle waiting tickets no longer trigger Event actions.
- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- 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.
- Show Agents When Transferring - To specify whether an agent can select a specific agent when transferring tickets, select the appropriate option from the list.
- Default Reply Option - This determines whether the Reply or Reply All action is the default selection while viewing tickets. (Agents can use the reply button dropdown menu to manually select Reply or Reply All, regardless of this setting.)

## Timing

Timing settings are a good way to set up service quality 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 amount of time 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 amount of time 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 amount of time a ticket remains open before its duration sets off a warning.
- Duration Critical After - The amount of time a ticket remains open before its duration sets off a critical alert.

## Signatures

To ensure consistency among all Departments and Groups within the company, System 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.

Signatures can also include custom images, such as Agent photos, icons and logos, apart from the agent avatar. The editor within SmarterTrack makes it very easy to create rich, detailed signatures through the use of a rich HTML markup as well as system variables that will automatically fill information like an Agent's name, their Department and more. Note: When inserting images into a signature, they should be sized and placed so that they do not interfere with the other important pieces of information.

To view a specific signature, simply double-click the signature. To create a new signature, click New in the content pane toolbar. A signature window will load 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 WYSIWYG 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:

- Survey Name - SmarterTrack allows user signatures to include links to any survey that is available for the Brand and Department. Any survey created that is specific to a Department can be added to the signature created. In the signature itself, the text display will match whatever was added for the "Survey Link Text" created when the survey was initially created. For more information, see Surveys .
- Agent Avatar [#agentavatar#] - The avatar information for each Employee.
- Email Address [#useremail] - The email address of the Agent.
- 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.
- Username [#username#] - The username assigned to the Agent.

## 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 distributed 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 view a specific rebalance rule, simply double-click the rule. To create a new rule, click New in the content pane toolbar. The rebalance rule will load in a pop-up window 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 - Check the agent(s) 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 view the quality control settings for a specific agent, simply double-click the agent. To create a new quality control rule, click New in the content pane toolbar. 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.

## VOIP

SmarterTrack Communicator is a SIP-compliant voice over IP (VOIP) softphone that seamlessly integrates a company's phone system with SmarterTrack. Because it is configurable within SmarterTrack, all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. This greatly increases an agent's flexibility and also limits the amount of management and administration needed. Administrators can use this section to manage those settings related to SmarterTrack Communicator.

Note: The VOIP settings within SmarterTrack apply ONLY to SmarterTrack Communicator. While third-party VOIP clients can be used with SmarterTrack, those configurations would all be take place with the phone server or softphone client. A benefit of using Communicator is that it provides a centralized location for configuration.

To access this section, 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 VOIP . The settings will load in the content pane and the following tabs will be available:

### Options

- Purge Recordings After - Use this option to determine when SmarterTrack Communicator recordings are purged from the system. The number of days or size (MB) can be used to determine the purge threshold.
- Enable personal calls - Enable this option to allow agents to make personal calls while using SmarterTrack Communicator.

### Brand Configurations

Brand-level VOIP settings allow administrators to set up basic information about how SmarterTrack handles VOIP calls. From the list of configured brands, double-click a brand name to edit its associated VOIP settings. A modal window will display the following options:

- Country Code - The country code associated with the phone number.
- Phone Number - The primary phone number for the brand.
- Max Lines per Agent - The maximum number of phone lines each agent will have available.
- Chats Before Unavailable - The number of live chats an agent will require before they become unavailable for phone calls.
- Enable automatic call recording - When enabled, recorded calls are stored, by default, at



C:\Users\[USERNAME]\AppData\Roaming\SmarterTrackCommunicator\Recordings. Call recordings associated to call logs are compressed after 7 days of inactivity to reduce disk space and reduce the number of files on the server.

## VOIP Accounts

Use this tab to configure the individual agent VOIP accounts. 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. In the modal window, the following tabs are available:

### Options tab

This tab allows the administrator to specify basic information regarding the account. The available options are:

- Agent - The agent to associate with the VOIP account.
- Group - The group to associate with the VOIP account/agent.
- 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.

## Extensions

A list of all configured groups can be found on this tab. If there is an extension for the group as a whole, it should be entered here.

## Who's On

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. By default, Who's On will track only the SmarterTrack portal; however, integration with a company website is also available. That said, if you do add the Who's On code to an external website, the SmarterTrack portal must be secured with an SSL certificate.

To access this section, 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 Who's On . The settings will load in the content pane and the following tabs will be available:

### Options

Use this tab to edit the following settings:

- Enable Who's On - Who's On is not enabled by default. Check this option to begin analyzing your real-time visitor traffic.

### Website Integration

When Who's On is enabled, it will automatically begin monitoring SmarterTrack portal traffic. Use this tab to integrate Who's On with your company website as well. The following settings are available:

- Host Header - In those instances where multiple brands are utilized and host headers are set up for each, a unique Who's On 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.

- **Virtual Page** - Virtual pages can be used to alter the name of the page displayed in Who's On. This is beneficial in differentiating Web pages that would otherwise be rendered as the same page. For example, your company's shopping cart may be shown as one page. If you want to know when a user is in the checkout section specifically, you can create a new Who's On script to put in that section with a virtual page of "Checkout". Then, when viewing your website traffic, you'll see when a customer moves from modifying their shopping cart to actually checking out. Virtual pages can also be used to simply shorten URL names. If the initial page URL is lengthy, the administrator may want to create a virtual page with a shorter identifier.
- **Support HTTPS** - If your SmarterTrack installation is configured with HTTPS, check this box to ensure Who's On works on your website, secured or unsecured. NOTE: In order for live chat links (and/or Who's On links) to work on an external website, the SmarterTrack Portal must be secured with an SSL certificate.
- **Put the following right before the page's ending </body> tag** - This is the actual script that will be placed on your website, between the main <BODY> HTML tags. The BODY end tag will generally be at the very bottom of the Web page's source. The code should be copied and pasted exactly as it appears, and it should be placed at the very bottom of your Web page so that the script is the LAST thing called when your website renders. This will prevent any potential issues with SmarterTrack prohibiting your website from loading when customers visit.