Concepts

Help Documentation

Concepts

The SmarterTrack Philosophy

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

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

The Customer Service Channels

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

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

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

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

For example, if an issue has escalated through the channels to a phone support incident before it is resolved, the company can now capture the data, search critieria, and steps taken to resolve the issue, and push that information to its employees. This creates an opportunity to update the arsenal of resources to more efficiently and cost-effectively serve its customers. Two weeks later, when another customer with the same issue enters a similar search query in the Knowledge Base or types certain key words into the live chat window, the information will be available immediately and can be displayed to the customer or agent in real time. As a result, the customer will find a solution two steps earlier than the previous customer did--instantly bringing efficiency to the customer service team and increasing customer satisfaction.

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

Inefficient Service Channel Flow

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

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

Efficient Service Channel Flow

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

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

Managing Channels From One Application

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

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

Company Organization

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

Each Department requires at least one Group -- known as the Front Line Group -- so that tickets emailed in or submitted via the customer-facing Portal have a place to go. A good rule of thumb for any Front Line Group is to add that to the Group's name. For example, "Sales Front Line" or even "Sales FLG" so that you can differentiate it from other Groups you create for that Department. Tickets from the Front Line Group can then be transferred to other Groups, or even other Departments, as needed.

Below is a simple graphic showing the structure of Vandelay Industries, a purveyor of fine latex products. Vandelay has 2 Departments: Sales and Support. Within each Department are 2 Groups. For the Support Department, there is the Front Line Support Group, which handles all incoming support requests. Then there is the Escalation Support Group, where harder or more time consuming issues are transferred. The Sales Department, on the other hand, has Front Line Sales, where all sales requests go, and Enterprise Sales, where larger sales are transferred. Each Group, then, has a number of different Employees who handle their repspective tickets. (Or live chats, or phone calls, etc.)

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

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

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

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

A Small Travel Agency

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

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

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

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

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

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

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

A Medium-sized Equipment Manufacturer

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

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

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

- Customer Service Department, customerservice@example2.com

- Level 1 Customer Service
- Level 2 Customer Service
- Customer Service Management
- Product Development Department, productdevelopment@example2.com

- Group for each project
- Product Development Management
- Quality Assurance Department, qualityassurance@example2.com

- Group for each project
- Quality Assurance Management
- HR Department, hr@example2.com

- Benefits
- Payroll
- HR Management
- Billing Department, billing@example2.com

- Level 1 Billing
- Accounts Payable

- Accounts Receivable
- Billing Management

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

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

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

Business Solutions

Education

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

Manage Student Affairs Through Tickets

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

Monitor Your School's Website Visitors

- Monitor your website and cultivate interest in prospective students by proactively inviting them to chat.

- Track where school website visitors originate and target recruitment efforts based on that information.

Enhance Communication Through Live Chat

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

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

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

Real Estate

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

Improve Seller and Buyer Communication with Tickets

- Allow buyers and sellers to submit requests and documents via trackable tickets to facilitate faster response.
- Assign project tickets to signage teams, contractors, and office staff to ensure task completion.

- Create reports for owners and sellers based on the types of inquiries for their respective properties and suggest ways to improve responses and interest with real data.

Use Events and Notifications to Monitor Work Flow

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

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

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

Find Out Who is Looking at Your Properties Online

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

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

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

Advertising

Copywriters, design professionals, media buyers, sales teams, creative concept providers, and clients all interact in the dynamic world of modern advertising. Coordinating and tracking these complex communications and interactions is both more difficult and more important than ever before. SmarterTrack is the perfect solution to manage these vital communication channels and deliver results to advertising organizations and their clients.

Improve Coordination and Assignments with Tickets

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

Monitor Work Flow and Guarantee Deadlines

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

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

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

Deliver Relevant Information via the Portal

• Store standard information and common questions as searchable Knowledge Base articles on topics such as style guides, publication standards, specifications, deadline/submission calendars, and much more.
• Store standard agreements and forms online for easy download and reference.
• Give customers and contractors world-wide access to step-by-step instructions for content submission.

Manufacturing

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

Improve Satisfaction and Response with Tickets

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

Use Events and Notifications to Monitor Work Flow

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

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

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

Reporting for Efficiency, Quality Control, Marketing, and More

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

Deliver Product Information via the Portal

- Store standard information and common questions as searchable Knowledge Base articles, including: common terms, how to request service, MSDS information, specifications, and much more.

- Store standard agreements and forms online for easy download and reference.
- Record video “how to” and assembly instructions for easy and instant access 24/7.
- Use news items to highlight new or featured products and to distribute product updates. Allow customers and prospects to subscribe to receive the latest information as it becomes available.

Financial

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

Manage Your Clients' Banking Needs Through Tickets

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

Track Visitors on Your Financial Institution’s Website

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

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

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

Improve Efficiency with Custom Reports

• Use business intelligence reporting to evaluate the cost-effectiveness of different loan programs.

• Create custom reports evaluating loan officer response time, the effectiveness of underwriters, the length of time it takes a loan to close, and more.

Interact with Clients, Associates, and Employees Through the Portal

• Use the Knowledge Base to give customers immediate access to the latest information, including interest rates, credit card offers, debt consolidation options, loan procedures, financial planning options, and ongoing promotions.

• Store standard agreements and forms online for easy download and reference.

• Give employees and associates instant access to payroll information, internal documents, and more through the Portal.

• Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients resolve their own issues.

Insurance

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

Manage Claims and Communications Through Tickets

• Streamline operations and improve business process workflows by allowing clients, agents, and brokers to submit inquiries and rate quotes via trackable Tickets.

• Allow clients and agents to submit insurance claims and support documents via Tickets at any hour of the day.

• Improve claims documentation by storing entire communication histories in one convenient, searchable interface.

Monitor Your Company’s Website Visitors

• Geographically locate website visitors and funnel leads to local agency offices faster than ever before.

• Track visitors who reach your site via referring sites and treat them as hot leads.

• Push additional insurance information, such as coverage clauses and rate tables, to website visitors as they browse.

• Enhance Communication with Clients, Agents, and Brokers Through Live Chat

• Foster long-term customer loyalty and satisfaction by providing online assistance and proactively satisfying client needs.

• Provide real-time answers and guide site visitors to the insurance options that best meet their needs.

• Help visitors understand estate and financial planning options or claims procedures by providing instant access to financial advisors and claims agents.

Improve Agent Efficiency with Custom Reports

• Identify new prospects and markets by claims or quote requests and automatically report this information to the appropriate agents.

• Create custom reports to evaluate claims by amount, type, neighborhood, policyholder, and more.

Interact with Clients, Agents, and Brokers Through the Portal

• Use the Knowledge Base to give clients immediate access to the latest information, including rate changes, policy offerings, payment schedules, discount eligibility, and more

• Give agents and brokers instant access to payroll information, internal documents, and more through the portal.

• Store standard agreements and forms online for easy download and reference.

• Create Knowledge Base articles that address recurring questions and make them instantly accessible to help clients and agents resolve their own issues.

Government

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

Manage Constituent Communications Through Tickets

• Allow new residents to set up services such as water and trash pick-up via trackable service tickets.

• Record, track, and escalate incoming issues to the appropriate individual or department, providing effective resolution to citizen inquiries the first time around.

- Process and track public information requests from residents and news media.
- Give citizens around-the-clock access to check the status of tickets and service requests.

Monitor Your Company's Website Visitors

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

Improve Employee Responsiveness and Constituent Relationships Through Live Chat

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

Increase Citizen Access and Improve Service Through the Portal

- Use the Knowledge Base to provide residents with information about government programs and services, including code compliance guidelines, council and board meeting minutes, recreation and special interest classes, and office closures due to government holidays.
- Facilitate discussion between residents, government officials, and staff with online forums.
- Store standard forms online for easy download and reference.
- Create Knowledge Base articles that address recurring problems and make them instantly accessible to help constituents resolve their own issues.
- Encourage residents to stay informed by subscribing to news items via RSS feeds.

Travel

Companies in the travel and hospitality industry are operating in increasingly complex and competitive environments, and often the only way these companies differentiate themselves is on the consistency of their brand in terms of service, customer experience, price, value, and convenience. With SmarterTrack, airlines, travel agencies, and hotels can increase online booking and earn customer loyalty by providing better customer service and streamlining day-to-day operations.

Manage Inquiries and Bookings Through Tickets

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

Monitor Your Company’s Website Visitors

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

Increase Bookings and Enhance Communication Through Live Chat

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

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

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

Types of Users

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

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

Users

Each individual that visits your portal or sends an email to your company is considered a user. Because all users are assigned roles (which define permissions and dictate which features the user has access to) companies can restrict a user's access or ability to perform certain actions. Depending on the user's role, companies can:

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

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

Agents

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

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

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

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

Understanding Tickets

Many organizations have adopted simple email solutions for keeping track of their customer interactions, and such solutions may have their place when dealing with one or two replies in a relatively brief amount of time (hours) and/or when individual agents manage the entire process. However, these simple mail solutions become less and less effective with complexity--the more agents, transfer opportunities, consultations, and time involved, the more prone these systems are to fail in the delivery of good customer service:

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

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

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

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

Transitioning from Email to Tickets

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

For a more gradual solution, SmarterTrack can be run in tandem (concurrently) with the email solution. New service and support requests can be directed into SmarterTrack and existing tickets can be managed via the email-only solution. Over time the process should naturally fall entirely into the SmarterTrack system. Customers will still interact with agents via their email, but agents will enjoy the SmarterTrack Web interface and the additional functionality of the program.

More Communication Options Available

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

Harnessing the Power of Tickets

The full efficiency of SmarterTrack tickets is gained by understanding, and harnessing, several important feature sets.

Closing Tickets

There's really no other way to say it: Tickets should be closed and locked. Whether you manage this through the way you set up your Departments and Groups using the auto-close feature, or by instructing Agents to close and lock tickets after a certain number of follow-ups, closing and locking tickets is really the only way to get a true sense of the workload your Agents deal with.

Simply closing tickets is fine as it can help you understand issues and workload, but simply closing a ticket allows a response -- either a response from the customer or even an autoresponder -- that can re-open a ticket. And as many help desk managers know, a customer will tend to reply to an existing ticket with a new problem as it's already a line of communciation to a company, and generally easier than starting a new ticket. However, that re-opened ticket can have an adverse affect on a Department's, Group's and Agent's metrics. Whether you're calculating total number of responses, the number of ticket closes, ticket replies or even idle time, a re-opened ticket can throw all of those off. And one reply to re-open a ticket can mean the difference to an Agent if their compensation is based on those metrics. Therefore, the only true way to ensure you're getting solid, reliable and manageable metrics is to close and lock a ticket so it can't be replied to.

Resolutions

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

Searches

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

Attachments

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

Comments/Notes

Internal comments and notes can be typed in line, maintaining chronology with customer communications and providing additional context, documentation of voice communications and other details to agents who may need to handle the issue.

Events and Notifications

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

Transfers and Escalations

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

Custom Fields

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

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

Related Items

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

Reports

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

Understanding Live Chat

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

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

Real-time Typing

SmarterTrack's live chat feature not only shows agents when a customer is typing but what they are typing as well. Agents can use live chat's real-time customer typing feature to ensure speedy and accurate responses by preparing a response ahead of time or looking up relevant resources while the customer is typing.

Coaching and Co-chat

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

Live Chat Translation

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

For more information regarding live chat translation, refer to the KB article Automatically Translate Live Chats .

Understanding Active Groups

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

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

If all agents are either logged out or if there are no active and available agents, any tickets or live chats will be directed to the queue and they will sit there until agents log in and become active or until an agent cherry picks the ticket or live chat from the queue. (For more information on cherry picking, see

Live Chat Distribution Methods .) For this reason, training agents to check their status upon logging in or prior to logging out is critical to the company's success.

Agents can manage their active groups by using the Available/Unavailable drop down menu in the upper right corner of the management interface. Clicking on Active Groups will pop up a modal window displaying all the groups the agent is assigned to and whether the agent is active or inactive. For more information about Active Groups, see Active Groups . For information about how organizations can monitor the status of their agents, see the KB article Monitor Agent Status .

Understanding Users / Organizations

SmarterTrack allows companies to organize Users -- those people who log into the customer-facing Portal to submit tickets, comment on KB articles, participate in the Community, submit tickets via email, etc. -- into Organizations. Organizations consist of "members" who are linked together based on certain criteria, such as a specific email address or even a specific domain name. Organizations then group all communication from Organization "members" in one location. This includes all tickets, live chats, call logs and surveys that were submitted from those members. Organizations allow Agents, Managers and Administrators to see all communication from all Users who are part of a specific Organization.

Users

Users are, essentially, those people who communicate with Agents or who visit the customer-facing Portal to seek out information or to interact with other users in the Community.

SmarterTrack offers companies the ability to set permissions for Users, called Roles. Roles allow a company to allow Users to do certain things: view knowledge base articles, leave feedback on knowledge base articles, participate in the Community and much more. Custom Roles can even be created so that specific customers can have specific permissions. For example, if you want to create a Focus Group of users that have access to a "Focus Group Only" Community thread, that is definitely possible by creating a Focus Group Role within SmarterTrack. Roles, therefore, allow a company to grant, or deny, permissions to sets of Users to access all of the features available on the Portal, or to just some features. For more information, see the Roles page of this online help document.

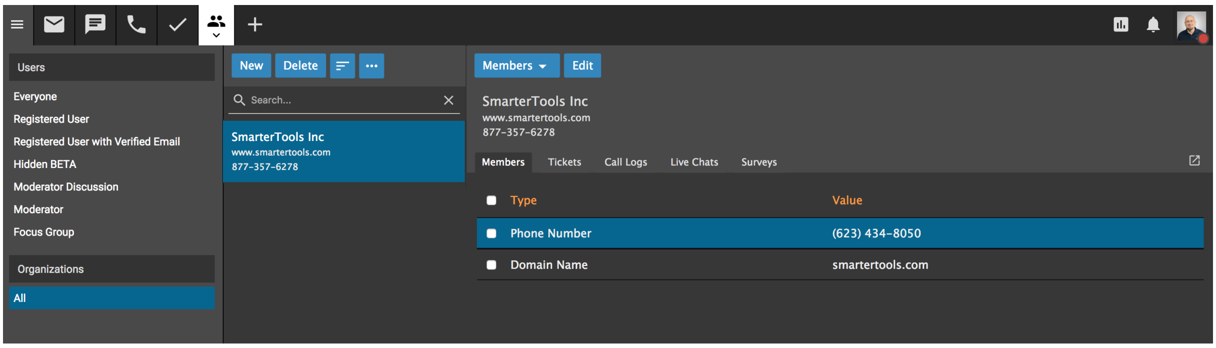
Organizations

Organizations offer companies a way to group communications from a specific set of Organization "members". A member is a User that fits the criteria set up for the Organization. When creating an Organization, members are added based on a specific Member "Type":

• Email Address - This would be a specific email address, such as management@example.com. Many times, a single email address is used by multiple people to submit tickets, start live chats, etc. when interacting with SmarterTrack.
• Username - Just as with an email address, multiple users can communication with Agents from a single username.
• Domain Name - Many times, multiple users can commmunicate from a specific company, but they all use an email address that origintes from a specific domain. For example, management@example.com, jsmith@example.com, etc. By using the Domain Name for your Organization members, any communication originating from the "example.com" domain would be included for that Organziation.
• Phone Number - Most beneficial for Call Logs, or for companies who offer phone support over other types of customer communication such as live chat or email ticketing.

One of the great things about creating an Organization is that members can be added based on one or more of the Types listed above. That means that multiple different email addresses can be used for a single organization. For example, adding jsmith@example.com and jdoe@example.co.uk to an Organization will capture all communitcations attributed to those 2 email addresses. Or multiple different domains can be added. So, adding example.com and example.co.uk would capture all communications originating from ANY email address that includes either of those domain names. It's even possilbe to add Domain Names and phone numbers, or any variety of all of the Types available for Organization Members.

Below is an example of an Organziation created for SmarterTools. The Type used for members is both Domain Name and Phone Number. As you can see, Tickets, Call Logs, Live Chats and Surveys from any User with a @smartertools.com email address or who calls in from the SmarterTools' phone number will be captured in the SmarterTools Organization...



Understanding Who's On

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

The Virtual Shop

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

Use with Live Chat to Increase Sales

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

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

Understanding the Knowledge Base

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

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

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

Organizing the Knowledge Base by Brand

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

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

Using the Knowledge Base with Tickets and Live Chats

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

Similarly, when an agent is participating in a live chat with a customer or responding to a ticket, SmarterTrack uses the text of these conversations to actively search the Knowledge Base for applicable articles. By automatically displaying possible solutions from the Knowledge Base to agents, SmarterTrack helps companies ensure that their customers receive timely and accurate responses to their inquiries.

Using the Knowledge Base as a Marketing Tool

SmarterTrack's Knowledge Base takes companies into the next generation of information delivery. Each article can contain images, video, code block and other special features, and each article helps improve search engine optimization strategies by auto-generating canonical and meta description tags. By incorporating multimedia and search engine optmization strategies into Knowledge Base articles, companies can transform their Knowledge Base content into a valuable marketing tool.

Marketing benefits include:

- Knowledge Base articles are search engine optimized and will display in search engine result pages, allowing competitors' customers to discover your company as they seek answers to their own questions.

- Utilizing the Knowledge Base can improve your company's overall SEO strategy by helping you build links and improve Google PageRank.

By incorporating SEO strategies into our own Knowledge Base, SmarterTools has successfully topped search engine results for a variety of searches. For example, the SmarterTools KB article "Where are My IIS Log Files Stored?" currently ranks in the Top 10 for the search phrase "IIS log files." As a result, that article has received hundreds of thousands of views and is our most popular article to date.

Understanding the Community

Having a centralized location to interact with end users and customers is key to any business. With that in mind, SmarterTrack includes a customer community area. The Community integrates functionality found in a traditional forum, along with added features, and allows users to post comments and suggestions, ask questions or offer other feedback, and even has a voting system where users can upvote things like feature requests or answers to questions.

Of course, for a community to be truly effective, the communication needs to be two-way. That's why the Community allows agents to reply to topics, mark a reply as the answer to the question, or even set a status for problems and ideas. This means agents can reply to items posted in the community and also keep users apprised of where a particular issue, question or problem resides in the communications pipeline.

Elements of the Community

The Community is made up of a few elements that piece together to make it organized and efficient:

Types - There are four Types available when creating a thread that are used to organize thread content: Announcements, Ideas, Problems and Questions. All communication in the Community can be sorted into one of these types.

Statuses - For each type there are associated statuses. (Except for Announcements.) These can be switched as the thread evolves to help keep users up-to-date on the progress of the thread at a quick glance. The statuses are listed below, with the default status that is set when a user creates the thread listed first:

- Ideas

- Proposed
- Under Consideration
- Planned
- In Progress

- Denied
- Completed
- Problems

- Submitted
- Known
- Not a Problem
- Being Fixed
- Resolved
- Questions

- Unanswered
- Answered

Categories - Categories are used to separate threads within the Community. These can be customized to your company, based on the products or services offered or types of discussions you'd like to encourage. For example, if your company sells jewelry, separate categories for "General Discussion", "Necklaces", "Bracelets", and "Earrings" might be beneficial. Roles can also be used to create private categories that only specific users can access. This is helpful if you'd like to receive feedback from or discuss future products with only a specific group of users.

Tags - Tags are customizable keywords that add a broad explanation of the thread's content. By clicking on a tag, users can find other threads with the same tag or similar content. Using the example above, if a user posts in the Necklace Category, they might add a tag for the name of the necklace that was purchased. Note: When a thread is assigned a category, the category name will appear among the list of tags and can be distinguished from user-created tags by their grey color.

Voting System - The voting system encourages user collaboration at the click of a button by allowing users to mark threads that they feel are important or valuable. Voting is specifically beneficial when used with threads posted with an Idea Type as these help users and agents take notice of the popular requests or bug reports. Replies to threads can also be "liked" by using the thumbs-up icon to help users quickly identify responses that add value to a conversation.

User Profiles - Registered users in the Community have a unique user profile that includes their recent community activity, a brief text overview and statistics on their participation. Agents that are logged in and viewing a user's profile can see their contact information, as well as quickly start an outbound ticket with the user or view their past communications and user details. In addition, users can communicate amongst each other, and agents, privately using the Conversations found in their user profile section.

Browsing the Community

Community threads are fully searchable and search engine friendly, adding an additional layer of search engine optimization to your customer portal. Users can utilize the search bar to organize and view threads by keywords, Tags, Category, Type and/or Status so that threads are easily found. Furthermore, the bolding and highlighting of unread content helps users quickly spot new activity that has not already been viewed.

Below the search bar are a number of tabs that can further narrow the search results or the browsing view. Note: Unless otherwise stated, threads are ordered by date of either the thread submission or date of last reply. Comments do not affect sort order.

- Recent - Displays threads in order of date.
- Votes - Displays threads by number of votes. Multiple threads with the same number of votes will be sorted by date.
- Unread - Displays all unread threads.
- My Activity - Displays the threads that you have created or have participated in.
- My Subscribed - Displays the threads that you are currently subscribed to. Note: Any participation in a Community thread will automatically subscribe you to that thread. A digest email that informs you of changes to all subscribed threads will be sent hourly. These settings can be altered per user in the My Settings area of the Portal.
- Moderate - Displays a list of items that need to be reviewed for abuse. Community Moderators will only see this tab when an item needs moderation.
- Banned (x) - Displays a list of users who are banned from participating in the Community, where x indicates the number of banned users. While Community threads may be viewed, the user will not be able to reply to threads, comment on replies, vote on threads, etc. The reason a user was banned is displayed next to their display name. Click the user to visit their Community profile, where the user can be unbanned using the red Banned flag.

Creating Threads

When users create a Community thread they'll choose whether to Propose an Idea, Report a Problem, or Ask a Question. If there are Categories configured, one must be selected from the list. Using the WYISWYG editor, users can format their post for clearer content or even add hyperlinks to URLs for easy navigation. Tags can be single words or phrases and are entered by pressing the Enter or Tab key or by using the mouse to click the tag that's shown while typing. To avoid having multiple threads with similar content and to help answer common questions, a list of related Community threads and Knowledge Base articles can be found to the right. These threads and articles populate based on the tags, title and content of the thread being created. Furthermore, users will be automatically subscribed to threads that they create so they can stay up-to-date on its progression.

Complete Interaction and Self-Service

When coupled with the included Knowledge Base and News, the Community provides users with a full complement of self-help resources to find answers to questions, interact with others and truly centralize all of your customer communication into one area. In addition, as agents are able to interact with end users and customers, the Community gives a business yet another way to keep customers informed and interact with them from a single, centralized location.

Understanding Multi-language Support in SmarterTrack

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

With support for 20 different languages, SmarterTrack makes it easy to communicate with customers on a global level. Multi-language support is provided through:

- Default language files
- Translatable strings
- Live chat translation
- Knowledge Base translation

Language Files

Supported languages are part of the default installation for SmarterTrack. These translations are, by default, stored in C:\Program Files (x86)\SmarterTools\SmarterTrack\MRS\App_Data\Translations. These files also correspond to the language selection dropdown on the Portal.

One of those files is the English language en.xml file. This contains all of the strings, in English, throughout SmarterTrack. As such, it can be used as a template for creating new, unavailable translation files. That means that if you need SmarterTrack in a language that's not available, that en.xml file can be used as a guideline for creating your own language file. If you create your own file and drop it in the \Translations folder, that language will appear on the portal side and also on the Management Interface side.

Translatable Strings

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

Live Chat Translation

Businesses with multi-lingual employees can automatically route live chat in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multi-lingual employees can use the live chat translation feature to allow all agents to respond to chats in nearly every language. For more information regarding live chat translation, please refer to the KB article Automatically Translate Live Chats .

Knowledge Base Translation

Companies with global operations can create Knowledge Base articles in multiple languages and link those articles together. By linking the different versions of the article together, SmarterTrack will recognize that all of the articles are essentially the same; they are just written in different languages.

Understanding Single Sign-On

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

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

For more information on implementing Single Sign-On, see the KB article Configure Single Sign-On Between SmarterTrack and Another Site .

Defining Workflows and SLAs

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

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

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

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

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