SmarterTrack

Help Documentation

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SmarterTrack Help

Welcome to the SmarterTrack Help System.

The tree menu on the left offers links to various pages that can help guide you through a better understanding of what SmarterTrack is and how it works. This documentation is also broken down by role, and has pages that correspond to sections within the SmarterTrack web interface. Reviewing these pages will help you use SmarterTrack more effectively, and each page is linked from within SmarterTrack itself: either by clicking on any ? icons on modal windows, or using the "Online Help" link that appears when you click on your avatar. Whichever method you use, you'll be taken to the page in help that directly corresponds to the page you're on.

At the top of each help page, there are links that will allow you to do various things: visit the SmarterTools Community, browse the knowledge base, search through the help documentation, print the page you're on, translate the page you're on, or view the entire help as a PDF file.

If you need assistance beyond what's available in this documentation, feel free to contact customer service . We also offer paid support options or you can visit the self-help options available from our portal : the knowledge base and the SmarterTools Community.

Getting Started

Below are some helpful links to sections of help to get you started. These

If you're not quite to the point of getting SmarterTrack installed, that's okay: the links below can still be useful, and reviewed prior to getting things all set up. If you're unsure about installing SmarterTrack, that's okay too: SmarterTools offers complimentary installation of any new license purchase! You should have seen that as an option when you placed your order but if not, just email us at sales@@smartertools.com and we can help get you scheduled. In addition, SmarterTools offers paid training to help get you on your way to expert mail server management.

Installing SmarterTrack

Installing SmarterTrack is a relatively simple process. However, we do offer a step-by-step walkthrough of the entire process, from installing the application to walking through the setup wizard.

- Installation Process

Basic Concepts

Once you get SmarterTrack installed, it helps to familiarize yourself with the concepts around the various features it has to offer. Below are a few things to get you started.

- Company Organization
- Understanding Tickets
- Understanding Live Chats
- Understanding Active Groups
- Understanding Users / Organizations
- Defining Workflow and SLAs

SmarterTrack Organization

SmarterTrack is organized in a top-down structure: You start with a Brand, then add in Departments, then Groups for each Department. Then you add Employees, or Agents, to the Groups. And each Employee you add can have various Roles.

- Brands
- Departments
- Groups
- Employees
- Roles

Configuration Items

Once installed and set up, SmarterTrack pre-populates some information to help get you started: A news item, an initial ticket, etc. However, there are some things you'll want to get set up prior to making your help desk live.

- Email Set Up
- Live Chat Set Up
- Ticketing
- Basic Security

Logging In

Once you get SmarterTrack initially configured, you're logged in to the interface -- either the Portal or the Management Interface -- automatically. However, after that you and your Agents will need to log in again. In addition, it's good to understand Agent Availability, know what the Dashboards do, etc.

- Logging in to SmarterTrack
- Agent Status
- Dashboards

Tickets

Tickets are the lifeblood of any help desk as they're the primary way employees interact with customers. Tickets can be submitted via the Portal, via email, or a combination of both. Each ticket is logged and tracked for easy reporting as well.

- Overview
- Ticket Distribution Methods

- Viewing Tickets
- Replying to Tickets

Live Chat

After email and tickets, live chat is probably the most common way customers interact with a company. Live chat is the ideal way employees can help customers in real-time. Chats are also logged and tracked for easy reporting.

- Overview
- Live Chat Distribution Methods
- Active Live Chat Groups
- Viewing Live Chats

Assistance

SmarterTrack gives users a few self-help options, such as an extensive Knowledgebase and a user-to-user Community. However, employees have resources as well, including the ability to use the knowledge base or canned replies for easy, quick access to information.

- Knowledgebase Overview
- Creating KB Articles
- Canned Reply Overview
- Creating Canned Replies

General Information

What is SmarterTrack?

SmarterTrack is, at its core, a communication platform. With it, businesses and individuals are able to interact with their customers and end users using one or more communication channels (also known as "omnichannel support") -- from email, live chat and phone calls to the creation of self-help communities and resources. In addition, SmarterTrack offers a number of internal communication methods so that agents and managers can get the help they need, when they need it. Features include:

- World-class ticketing solution
- Interactive live chat
- Comprehensive knowledge base
- Customer community
- Public Web portal
- Call logs and VoIP integration
- SIP-compliant soft-phone
- Who's On visitor monitoring
- Complete task management system
- Time logs
- Self-help resources: knowledge base, news items, etc.
- Multiple brand support
- Integrated survey system
- Customizable forms
- Organizations for grouping communication by customer
- More than 70 summary and trend reports
- Support for Single Sign-On (SSO)
- And more...

SmarterTrack is a complete customer service solution for individuals, small businesses, and enterprise organizations and is available as a traditional software installation or as a hosted service. In addition to providing your company with an effective customer support structure,

SmarterTrack offers powerful tracking and effective reporting that help to manage company costs and employee scheduling.

What is SmarterTrack Communicator?

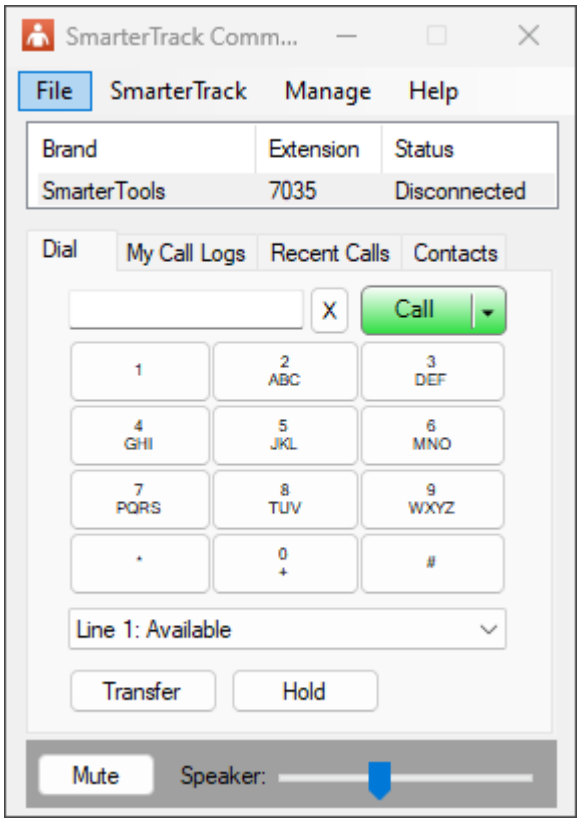
SmarterTrack Communicator is a SIP-compliant voice over IP (VoIP) soft-phone that seamlessly integrates a company's phone system with SmarterTrack. It is a licensed add-on and is configurable from within SmarterTrack, which means that all settings, profiles and agent information is pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to transfer calls, automatically create call logs, display incoming and outgoing call information, record calls for later review, offer complete call analytics and allow businesses to keep all customer communication (tickets, live chats and call information) in one location.

Note: The .NET 4.0 framework is required and should be installed on the laptop or desktop that will be running SmarterTrack Communicator. You can download the Web installer for .NET from the Microsoft Download Center .

SmarterTrack Communicator offers all of the features of standard VoIP soft-phones, including:

- The ability to record incoming and outgoing calls
- The ability to transfer calls between agents and departments
- Multi-line support
- Complete call history
- Phone contact list
- Recent call log
- Automatic call log creation
- Volume controls
- Mute button
- The ability to display incoming call info
- Multi-brand support

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



SmarterTrack Edition Explanation

Professional Edition vs. Enterprise Edition

SmarterTrack Professional has all of the features required to manage a fully-functional help desk. SmarterTrack Enterprise offers additional features, including:

- Scheduled and on-demand email reports
- Customer satisfaction surveys
- Customizable forms
- Single Sign-On (SSO)
- Support for multiple brands
- External providers
- Failover functionality Note: Requires a SmarterTrack Enterprise with Failover functionality license.

SmarterTrack Hosted Helpdesk

The Hosted SmarterTrack Helpdesk (SaaS) offers all of the Enterprise edition features, with the exception of Active Directory as an agent authentication method, as well as free access to SmarterTrack's VoIP soft-phone, Communicator.

SmarterTrack Free

SmarterTrack Free contains much of the same functionality as SmarterTrack Enterprise, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

SmarterTrack Edition Comparison

You can also refer to the following edition comparison chart for more information about each edition.

Management Interface

Features	Free 1	Pro	Enterprise
Tickets			
Agent responses by email	•	•	•
Transfer tickets (to agents, departments, groups and other installations)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Automatically suggests related tickets and knowledge base articles	•	•	•
Comments and resolutions	•	•	•
View/search ticket history	•	•	•
Canned replies	•	•	•
Mark tickets for follow-up	•	•	•
Ticket surveys	•		•
Ticket forms	•		•
Advanced ticket searching	•	•	•
Define custom fields for tickets	•	•	•

Force complete custom fields (agents only)	•	•	•
Multiple user-defined signatures per agent	•	•	•
Enforceable company-wide signature standard	•	•	•
Dynamic signature attributes by brand, language, etc.	•	•	•
Intelligent ticket routing (via cherry-picking or round-robin)	•	•	•
Custom ticket distribution options using Events	•	•	•
Tickets assigned to agent's brand and/or language	•		•
Automatic and manual rebalancing of ticket workload	•	•	•
Time logging	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Handle chats inline or as a popup	•	•	•
Audible and visual alerts	•	•	•
Chat idle time warning levels	•	•	•
Transfer chats (to agents, departments, and groups)	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•

Automatically suggests related knowledge base articles	•	•	•
View/search chat history	•	•	•
Automated responses	•	•	•
Live chat surveys	•		•
Live chat forms	•		•
Advanced chat searching	•	•	•
Define custom fields for chats	•	•	•
Force complete custom fields (agents only)	•	•	•
Available/Unavailable settings when going AFK	•	•	•
Get Assistance feature for agents	•		•
Google Maps and Bing Maps integration	•	•	•
Manage chat queues	•	•	•
Multiple chat session support	•	•	•
Co-chat with other agents	•	•	•
Administrator participation without transfer (coaching)	•	•	•
Automatic agent failover	•	•	•
Support for alternate agent avatars and identities (aliases)	•	•	•

Intelligent routing (via cherry-picking or round-robin)	•	•	•
Custom chat distribution options	•	•	•
Live chats assigned by agent's brand and/or language	•		•
Time logging	•	•	•
Calls			
Track incoming and outgoing phone calls	•	•	•
Automatically suggests related knowledge base articles	•	•	•
Cross-associate tickets, live chats, calls and tasks	•	•	•
Integration with most VoIP systems	•	•	•
Click-to-call functionality	•	•	•
SIP-compliant soft-phone		Add-on	Add-on
Tasks			
Time logging	•	•	•
Assign tasks to agents	•	•	•
Assign a status to a task (approved, in progress, etc.)	•	•	•
Create recurring tasks	•	•	•
Visual alerts for overdue tasks	•	•	•
Cross-associate tickets, live chats, calls, and tasks	•	•	•
Managers can view and track tasks for their departments	•	•	•

Who's On			
Live monitoring of users on website	•	•	•
Filter visitors by brand, page, or any available attributes	•		•
Advanced visitor and session display in preview pane	•	•	•
Integrated with live chat for pushing and inviting of live chats	•	•	•
Filtering of users on website	•	•	•
World geographic density map	•	•	•
Who's On surveys	•		•
Integrated with events system for automated actions	•	•	•
Knowledge Base			
Embed document links in KB articles and news items (attachments)	•	•	•
Embed flash files (.swf) in KB articles and news items	•	•	•
Embed media files in KB articles and news items	•	•	•
Organize KB articles and news items by brand	•		•
Edit multiple KB articles concurrently	•	•	•
HTML tag stripping tool	•	•	•
Set stale dates for KB articles	•	•	•

Mark KB articles for review	•	•	•
View statistics for a KB article	•	•	•
View unsuccessful KB search queries	•	•	•
KB article comments	•	•	•
Check articles for broken links	•	•	•
Quick comment moderation	•	•	•
Assign articles to agents for creation	•	•	•
Events And Notifications			
Event-driven architecture	•	•	•
Notification profiles	•	•	•
Combine multiple actions into a single, manual event	•	•	•
Assign actions to events (.e.g. transfers, escalations, notifications)	•	•	•
Service Level Agreements (SLA) compatible	•	•	•
Automatically launch surveys from events	•		•
Assign actions to monitored survey results	•		•
Compatible with SmarterNotify real-time notifications	•	•	•
Reporting			
Over 30 summary reports	•	•	•

Over 30 trend reports	•	•	•
Cost analysis reports	•		•
Multiple event reports	•		•
Survey reports by agent, department, or group	•		•
Custom field reports	•		•
Scheduled and on-demand email reports	•		•
Define custom reports	•		•
Dual-axis charting	•	•	•
Administration			
Agent roles system	•	•	•
Define company structure	•	•	•
Multiple brand support	•		•
Active Directory authentication	•	•	•
Hidden departments	•	•	•
Agent avatars to personalize customer communication	•	•	•
Assign departments to a specific language	•	•	•
Assign departments and agents to specific brands	•		•
Real-time monitoring of tickets	•	•	•
Real-time monitoring of live chats	•	•	•

Supervisor monitoring	•	•	•
Quality control	•	•	•
Master categories for improved organization	•	•	•
Monitor and review individual surveys	•		•
Optimized database for large volumes	•	•	•
Minimum password requirements and enforcement	•	•	•
Extensibility			
External providers with custom fields	•		•
Define custom fields for live chats and tickets	•	•	•
Link to third-party databases via external providers	•		•
Authenticate customer and agent logins via third-party sources	•		•
Web services allow for integration into other applications	•	•	•
Web Interface			
Custom CSS for customization of the customer portal and management interface	•	•	•
Optimized controls provide desktop application performance	•	•	•

Responsive design that works on both mobile and desktop browsers	•	•	•
Multi-language compatible	•	•	•
AJAX spell-check	•	•	•
Rich text editing	•	•	•
Compatible with most tablets (iPad, Nexus 7, etc.)	•	•	•
Installation			
Hosted service option (SaaS)			•
Failover functionality 2			•
VPS server installation option	•	•	•
Shared server installation option	•	•	•
IIS 8.0+ supported	•	•	•
Compatible with shared hosting environments	•	•	•
Supports SQL Server 2008 R2 and higher	•	•	•
Supports SQL Server Express 2008+	•	•	•
Supports MySQL 5.7+ (and variants like MariaDB)	•	•	•
Implementation in Microsoft .NET 4.7	•	•	•

Portal Interface

Features	Free	Pro	Enterprise
Tickets			
Submit tickets through the portal	•	•	•
Submit tickets through email	•	•	•

Automatically suggests related KB articles during ticket submission	•	•	•
Insert attachments (configurable)	•	•	•
Capture visitor data (custom fields)	•	•	•
Live Chat			
Auto-translation in over 35 languages	•	•	•
Enabled chat links into website	•	•	•
Online/offline indication	•	•	•
Send files via live chat	•	•	•
Agent typing indicator	•	•	•
Capture visitor data (custom fields)	•	•	•
Email and print live chat transcripts (customer side)	•	•	•
Customizable chat icons	•	•	•
Detect and recover from lost connection	•	•	•
Knowledge Base			
KB article translation (link to manual translations or auto-translate with the built-in translation tool)	•	•	•
SEO-friendly article representation	•	•	•
Organized by category	•	•	•
Searchable (full natural search support)	•	•	•

Private KB articles	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Security			
Define role permissions for agents and end-users	•	•	•
Extended pre-defined roles (e.g. everyone, agent, registered user)	•	•	•
CAPTCHA support for ticket/thread submission and user registration (optional)	•	•	•
Anonymous/registered/authenticated user methods	•	•	•
News			
Multilingual support for all news items	•	•	•
SEO-friendly	•	•	•
RSS feeds	•	•	•
Social networking (e.g. Facebook, Twitter, etc.)	•	•	•
Web Interface			
Tabbed interface for improved organization	•	•	•
Multi-lingual support for all interface text	•	•	•
Customizable company logo	•	•	•
Google Analytics integration	•	•	•
Compatible with most popular Web browsers	•	•	•

Compatible with most mobile devices and tablets (iPad, iPhone, Android, etc.)	•	•	•

1 SmarterTrack Free Edition contains much of the same functionality as SmarterTrack Enterprise Edition, but is limited to a single agent. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

2 Requires activation of the SmarterTrack Enterprise with Failover Functionality license.

How SmarterTrack Works

There are two main components that work together within SmarterTrack: the Web interface and the database backend. Both components must be active for SmarterTrack to operate.

Web Interface

The Web interface is a website that is used for administration and interactivity with SmarterTrack. It is divided into two components: the management interface and the portal interface. Administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets and chats. Customers can use the portal interface to retrieve ticket information, submit new tickets and chats, search Knowledge Base articles, or participate in the Community.

Database Backend

SmarterTrack needs a database to store data. For SmarterTools customers using Hosted SmarterTrack, the database backend is installed on servers managed by SmarterTools. For more information regarding the database backend requirements, see Setting Up the Database .

There is a third component that is not essential for SmarterTrack to work, but offers a perfect complement to a SmarterTrack installation.

SmarterTrack Communicator

SmarterTrack Communicator is a SIP-compliant soft-phone that works with all major SIP-compliant VoIP phone servers. SmarterTrack Communicator is a licensed add-on and is configurable from within SmarterTrack. Therefore, all settings, profiles and agent information are pushed to whatever desktop or laptop an agent logs into. SmarterTrack Communicator includes the ability to transfer calls, automatically create call logs, display incoming and outgoing call information, record calls for later review, offer complete call analytics and allow businesses to keep all customer communication (tickets, live chats and call information) in one location.

SmarterTrack Mobile

The SmarterTrack mobile app, available on both iOS and Android, allows agents and managers to quickly and easily reply to tickets, respond to live chats, manage tasks, and log calls, wherever they are and whenever they're needed. It provides agents with a balance of functionality and speed, giving them the tools they need to manage customer communication when on-the-go or away from the office. Plus, it works with any installation of SmarterTrack: whether an on-premises installation or the SmarterTrack Hosted service! NOTE: You will need to have the most recent version of SmarterTrack installed to ensure you receive the full benefit of the SmarterTrack Mobile app. (This is not a concern for Hosted SmarterTrack customers.)

SmarterTrack is a very complex and full-featured help desk, so some of the features available simply do not translate well to smaller screens. As a result, the mobile app is a complement to the full version of SmarterTrack, not a replacement for it. Tablet users, for example, will find use of the full management interface via their mobile browser a more efficient way to interact with SmarterTrack.

Below is a list of some of the functionality available in SmarterTrack Mobile:

Ticket Management

- Reply to tickets
- Start new incoming/outgoing tickets
- Ticket transfers

- Take tickets from the queue
- Comment on tickets
- Set follow-ups
- Manage ticket status (active, waiting, etc.)
- Ticket priorities
- Much more!

Live Chat

- Reply to chats
- Transfer chats to other agents
- Take chats
- Coach agents
- Add related items
- Send a chat transcript
- Much more!

Task Management

- Create new tasks
- Edit task description and details
- Manage progress
- Assign/re-assign tasks
- Edit start/end dates and times
- Set reminders
- Much more!

Call Logging

- Create new call logs
- Edit log details
- Add attachments
- Add related items
- Edit start/end dates and times
- Much more!

Additional Features

- Multiple brand support
- Agent status (available/unavailable)
- Light/dark theme support
- System notifications
- Group status
- Biometric support

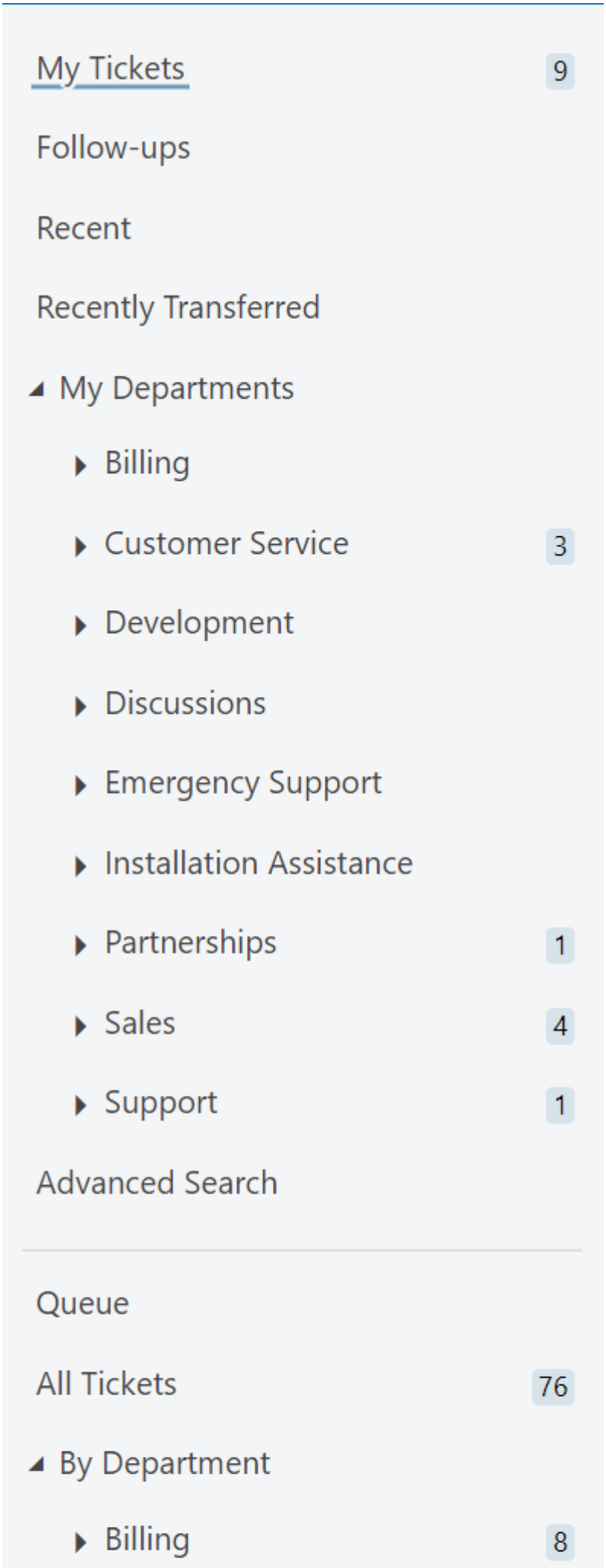
Interface Diagram

SmarterTrack User Interface

To better understand the different areas of the user interface, please refer to the diagrams below.

Navigation Pane

The Navigation Pane is used throughout SmarterTrack and provides the page options available to users, depending on the section of SmarterTrack they're in.


My Tickets 9
Follow-ups
Recent
Recently Transferred
My Departments
Billing
Customer Service 3
Development
Discussions
Emergency Support
Installation Assistance
Partnerships 1
Sales 4
Support 1
Advanced Search
Queue
All Tickets 76
By Department
Billing 8

Content Pane

The Content Pane is also used throughout SmarterTrack and is where the list of relevant tickets, live chats, kb articles, etc. are listed. Clicking on any item in the Content Pane opens it in the Preview Pane.

Active Waiting Closed

SmarterTools WHMCS modules
Cerrie Russell
Incoming CS
Duration 545d - Idle 49d
Ticket Number: 0C2-275AA393-0B40
Product:

Iphone email
HUGEL
Incoming CS
Duration 84d - Idle 83d
Ticket Number: 044-29BB331D-0B04
Product: SmarterMail

Android Beta
D. Curtis
Outgoing Sales
Duration 110d - Idle 110d
Ticket Number: 3A7-2998126A-0B30
Product: SmarterTrack

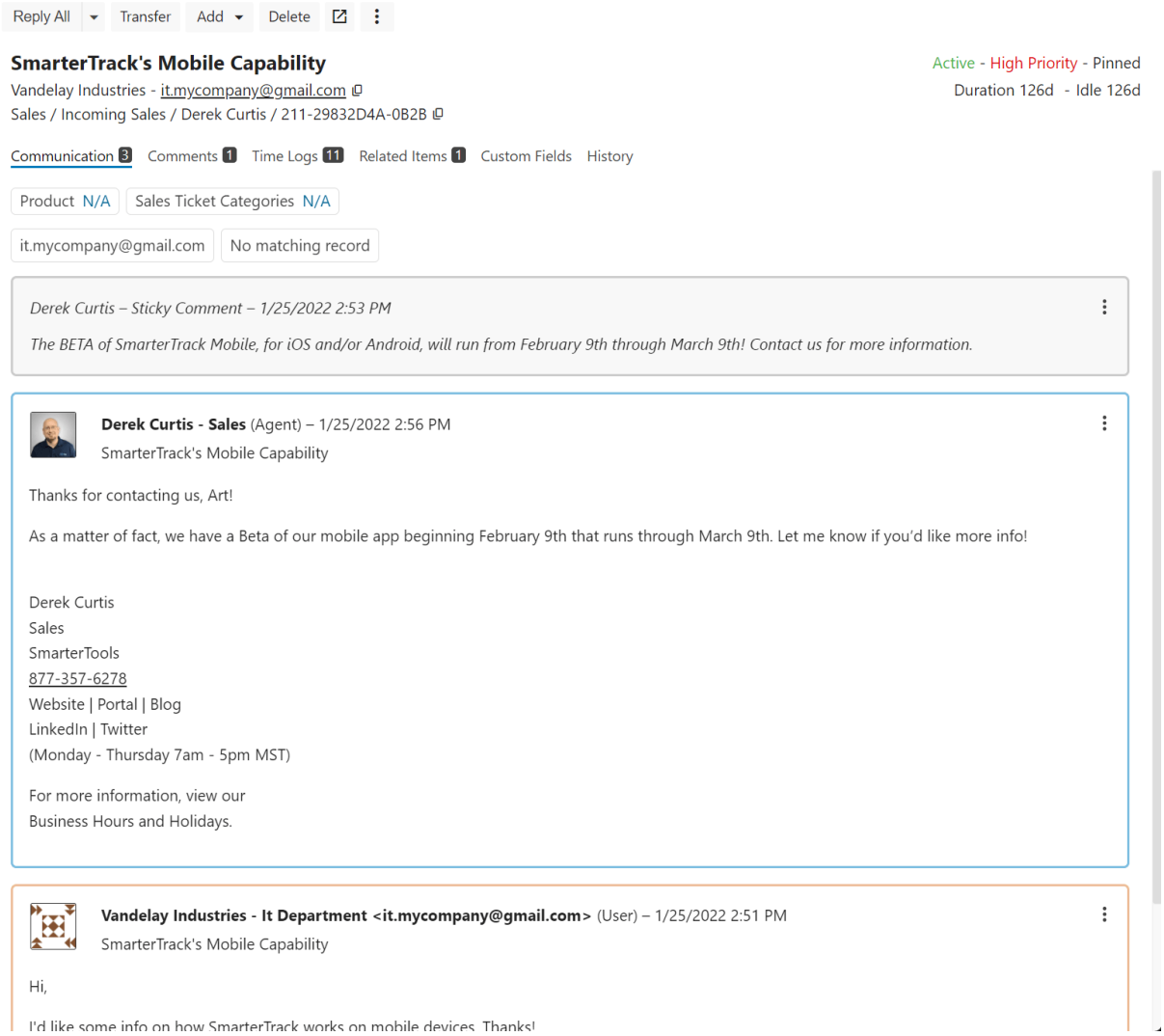
SmarterTrack's Mobile Capability
Vandelay Industries - it.mycompany@gmail.com
Incoming Sales
Duration 126d - Idle 126d
Ticket Number: 211-29832D4A-0B2B
Product:

A few pre-sales questions
Vandelay Industries - it.mycompany@gmail.com
Incoming Sales
Duration 134d - Idle 134d
Ticket Number: 3C4-29798993-0B05
Product: SmarterMail

SmarterTools and SmarterMail Questions

Preview Pane

The Preview Pane is where tickets, live chats, kb articles, etc. are displayed to users. Here, those items can be interacted with via the Action buttons. (E.g., Take, Reply, etc.)



Header

As the name implies, the Header area displays pertinent information about an item, particularly tickets and live chats.

Navigator

The Navigator allows agents, managers and system administrators to access all pages in SmarterTrack.

Clicking on it allows you to navigate to the following pages:

- Tickets
- Live Chat
- Call Logs
- Tasks
- Users / Organizations
- Knowledge Base
- Canned Replies
- News
- Reports
- Who's On
- Active Agents
- Settings

Next to the Navigator is the New button. Clicking that allows a manager or agent to create one of the following:

- Ticket
- Call Log
- Task
- Knowledge Base Article
- Canned Reply
- News Item
- User
- Organization

Selecting an item from the New menu opens a pop-out window, allowing an agent or manager to create the item selected.

To the far right, on the same line are:

- Reminders
- Theme
- User Dropdown/Icon

Concepts

The SmarterTrack Philosophy

Customers judge the quality of an organization's customer service on the basis of availability, the number of channels offered by the organization (and the transparency of those outlets) for contacting customer service, and the speed at which the customer can get their issue resolved. For this reason, companies can no longer rely on a single channel to deliver customer service to their customers. With SmarterTrack, companies can reach out to, and be contacted by, 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 the company's communication 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. This provides customers with the information they need while reserving agent resources to deal with highly complex issues.

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

For example, if an issue has escalated through the channels to a phone support incident before it is resolved, the company can now capture the data, search criteria, and steps taken to resolve the issue, and push that information to its employees. This creates an opportunity to update the arsenal of resources to more efficiently and cost-effectively serve its customers. Two weeks later, when another customer with the same issue enters a similar search query in the Knowledge Base or types certain keywords 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.

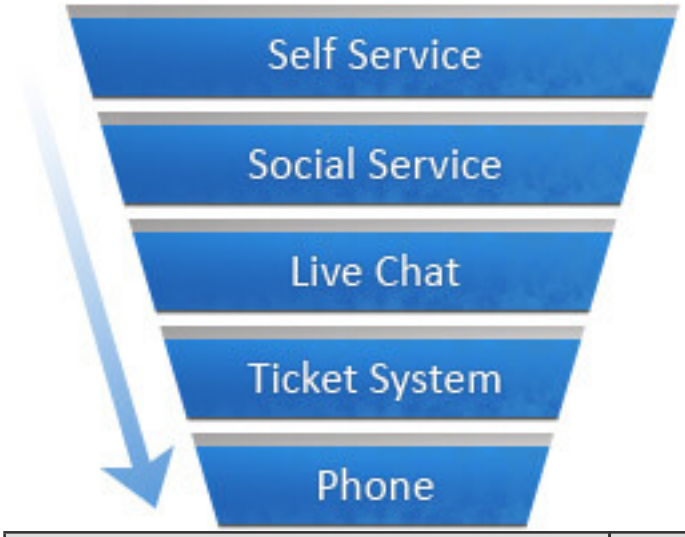
Over time, the constant feedback from tickets, Knowledge Base articles, social media posts, and KB or community searches dynamically increases the number of resolutions occurring closer to the top. The increasing efficiency can result in tens of thousands of dollars in saved costs and an increase in customer satisfaction as customers 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

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 respective tickets. (Or live chats, or phone calls, etc.)

Brand	Departments	Groups
	Support support@example.com	Front Line Support Support Escalation
	Sales sales@example.com	Front Line Sales Enterprise Sales

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. Replies to tickets are sent from the same department email address so that agents 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 groups 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.

• Employees will use SmarterTrack's management interface to interact with users (agents and managers) and set up all aspects of the system (administrators). 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. An agent with a "manager" role will have access to the various Departments and Groups associated with that manager role. Administrators are in charge of managing the SmarterTrack installation, creating Brands and the Departments, Groups and Agents that are part of that Brand, etc.

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.

Employees

Each person that accesses SmarterTrack's management interface is considered an employee. Employees are then broken down into various roles: Administrator, Manager and Agent are the default roles for Employees.

Anyone who will be managing the overall SmarterTrack installation, from creating Brands to adding Agents, is considered an administrator. By default, administrators are NOT agents, so they do not take an Agent role, nor do they count against the SmarterTrack agent-based licensing model, either for on-premises installations or for the hosted service. That's not to say an administrator can't be an agent -- they can. However, they do not need to be.

Managers, on the other hand, DO require the Agent role. A Manager has overall control of the Group they are managing, so they have the ability to see all tickets and live chats for any agent in their group, etc.

Finally, an agent is a front-line worker. They interact with Users via tickets, live chats, etc. 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 log in 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 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. Any agent can set up events, and use them as needed, but part-time agents will benefit from having that extra layer of notification.

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 ticketing 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 as simple as setting an email address up in an email client. This is because SmarterTrack can import messages from virtually any mailbox using the POP protocol. Messages are imported into SmarterTrack as tickets, and, if need be, the original messages can be left on the mail server or deleted once they've been imported. That same mailbox can be used for sending replies to tickets. In this way, users can email a generic email address, like support@@your_brand.com, and receive responses from agents from that same address.

The interaction between SmarterMail and your email server means that any communication, in or out, is handled by YOUR systems, not by yet another email system. SmarterTrack is NOT a mail server -- it uses existing email providers and simply sends and receives from those providers, just like connecting an email account to an email client like Microsoft Outlook. There's no need to set up proxy accounts, aliases, or any other hard-to-manage workarounds. You use the existing email addresses currently in use for any department within your organization, or any department you set up in SmarterTrack.

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 SmarterTrack management interface, via their own email clients, or even their mobile devices using the SmarterTrack Mobile app. 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 communication to a company, and generally easier than starting a new ticket. However, that re-opened ticket can have an adverse effect 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 re-opened.

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.

Therefore, the use of resolutions can help customers receive responses to their issues much quicker, just as it helps agents efficiently work through their ticket queues.

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 autopopulated 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 calls, 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 thereby utilizing their time more efficiently.

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 agents 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 your agents. For example, managers can proactively address issues by monitoring live chats in real time and offer assistance when needed - either by coaching an agent while they are engaged in a live chat or by participating simultaneously with the agent.

Other agents can participate in the chat as well, adding their own solutions or clarifications alongside the owner of the chat.

Live Chat Translation

Businesses with multilingual agents can automatically route live chats in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multilingual agents 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. All communication from Organization "members" is then groped together 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 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 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.

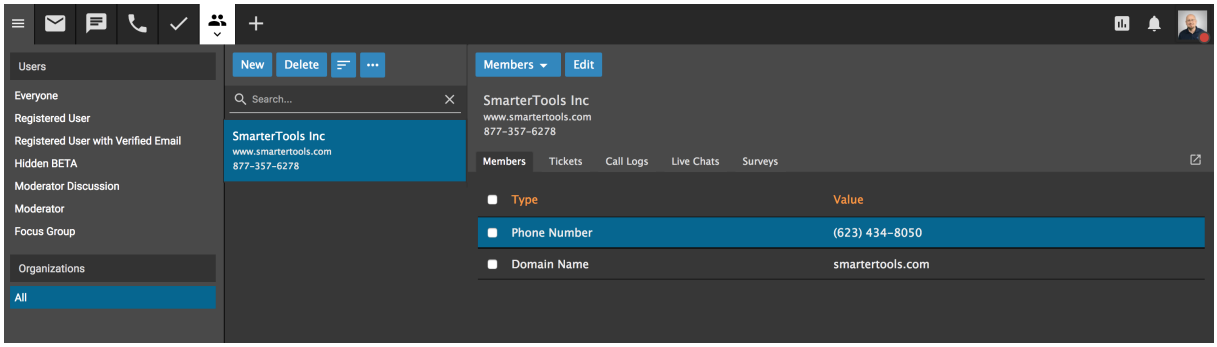
Organizations

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 communicate from a specific company, but they all use an email address that originates 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 Organization.
- 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 communications 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 possible 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 Organization created for SmarterTools. The Type used for members is both Domain Name and Phone Number. As a result, 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 and step in to answer questions and provide advice quickly, and then assist with the final transaction, in real time. 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. Using Who's On brings 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.

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 when they visit that product's portal.

Using the Knowledge Base with Tickets and Live Chats

When customers complete the ticket submission form on the portal, 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

optimization strategies into Knowledge Base articles, companies can transform their Knowledge Base content into a valuable marketing tool.

Marketing benefits include:

- Knowledge Base articles are search engine optimized and will display in search engine result pages, allowing potential customers to discover your company as they seek answers to their 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 though still controlling costs. While the ideal solution may be to have multilingual 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 may not be feasible and they can be cost-prohibitive.

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, automatically.

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 multilingual agents can automatically route live chat in different languages to the appropriate agent by assigning languages to departments. Businesses that do not have multilingual agents 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 online 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.

Practical Application

The events system in SmarterTrack acts just like "macros" that other help desk products offer. You set actions to occur based on a set number of conditions. Let's look at an example.

At SmarterTools, we offer Emergency Support for those times when a customer runs into a business-critical situation with one of our products. For example, they are performing an upgrade, but something happens during the upgrade process (e.g., they run out of disk space), and their installation fails. With their mail server unresponsive, they submit an Emergency Support ticket to us.

Our SLA for responding to Emergency Support tickets is 1 hour. (We regularly easily beat that, by the way, and average response times MUCH faster than 1 hour.) In order to ensure that the ticket is received, and that an agent responds, we have a few different events set up that offer varying degrees of notification if certain timeframes aren't met. Initially, when an emergency ticket is received, we have an event that sends an email out to all technical support agents, and an email is sent to the SMS address of each agent as well so they receive a text message notifying them of the ticket. If that ticket isn't "taken" by an agent within 15 minutes, a separate event sends an escalation notice (email and SMS) to the manager responsible for support. Other events are set up to further escalate to our COO if the ticket isn't replied to within 30, and then 45 minutes.

Using the event system, then, is a great way to ensure any SLA you have set for your business is met. Events can be created for almost every area of SmarterTrack, not just for tickets or live chats. Events can be created for task management, KBs, and more.

Installation and Deployment

System Requirements

These requirements are not applicable to those using Hosted SmarterTrack.

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

- Windows Server 2016 64-bit
- Microsoft .NET 4.8 NOTE: SmarterTrack does not support .NET translation packs as they can break the database install/upgrade process. If you have translation packs installed, you will need to uninstall them, then install or upgrade SmarterTrack. After this, you can re-install the translation packs.
- 4GB RAM
- 2-core CPU
- 8GB minimum disk space, primarily for Microsoft SQL installation. If using MySQL, disk space requirements may be less.
- One of the following databases (64-bit):

- Microsoft SQL Server 2012
- Microsoft SQL Server 2012 Express
- MySQL 5.7 or higher with InnoDB and a buffer pool size of at least 512M. MySQL variants, such as MariaDB will work as well.
- Dedicated IP address
- Active internet connection
- IIS 8.0 or higher. SmarterTrack uses web sockets, which are not supported in earlier versions of IIS.
- Dedicated App Pool
- SSL certificate. While not "technically" a requirement for SmarterTrack to run, SSL is now a standard for any website that's available on the internet. Free certificates generated using something like Let's Encrypt or Certify the Web work perfectly well for

securing your SmarterTrack portal and management interface.

- Minimal IIS Settings
- Application Development Features
- .NET Extensibility
- ASP.NET
- ISAPI Extensions
- ISAPI Filters
- WebSocket Protocol
- Common HTTP Features
- Default Documents
- Directory Browsing
- HTTP Errors
- Static Content
- Health and Diagnostics
- HTTP Logging
- Request Monitor
- Performance Features
- Static Content Compression
- Security
- Request Filtering

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

SmarterTrack and Azure

At this time, it's not recommended to install SmarterTrack on Azure. From our testing, Azure has a negative impact on the performance of SmarterTrack. For example, database

connections are generally slow, which can negatively impact how quickly sections of SmarterTrack load, how quickly actions can be performed, and more.

Browser Requirements

SmarterTrack is fully supported by all modern browsers. (Older browsers may work as well, but your experience will be best, at minimum, using a browser from the list, below):

- Google Chrome
- FireFox
- Safari
- Opera
- Microsoft Edge ("Legacy" Microsoft Edge is no longer supported.)

Mobile

When using tablet devices, SmarterTrack's responsive web-based interface allows end users and agents to use all of the functionality available to them on their desktop. For phones, SmarterTools offers the free SmarterTrack Mobile app, available for iOS and Android. Simply search for "SmarterTrack Mobile" in your device's app store to download it. It works for both an on-premises installation of SmarterTrack as well as Hosted SmarterTrack, and uses your existing SmarterTrack URL (e.g., support.your_domain.com) and login.

Installation Options

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

Installation on a Dedicated Server

For the purposes of the installation process, a "dedicated server" is any server a System Administrator has root access to. Examples of a dedicated server include a server that's hosted on premise, a server that's rented from a hosting company or ISP, a virtual machine

that's hosted on a local machine or that's rented from a VPS host, etc. The location of the server doesn't matter. What matters is that the System Administrator has the ability to remote into the machine and manage it just as they would their own desktop. This is, by far, the most common installation type for SmarterTrack. Please refer to the Installing SmarterTrack page for step-by-step installation instructions for this environment.

Installation on a Shared Server

A less common installation type is installing SmarterTrack in a shared hosting environment. This means that you have FTP access to a hosting space, but you don't have access to IIS or root access to the server your SmarterTrack site is hosted on. You only have access to your space and your space alone. Step-by-step installation instructions for this environment are also available at the bottom of the Installing SmarterTrack page .

Activation on Hosted SmarterTrack

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

Installing SmarterTrack

These requirements are not applicable to those using Hosted SmarterTrack.

SmarterTrack comes as a single installation file that contains everything necessary to install the product and get it set up on your server, regardless of the Edition that you intend to use. The features available are based on the license used during the activation process; if no license is entered, the Free Edition will be installed. The SmarterTrack installer can be downloaded from the SmarterTools website . Before you get started, however, make sure you have reviewed the System Requirements necessary for SmarterTrack to run.

Jump to:

- Installation on a Server

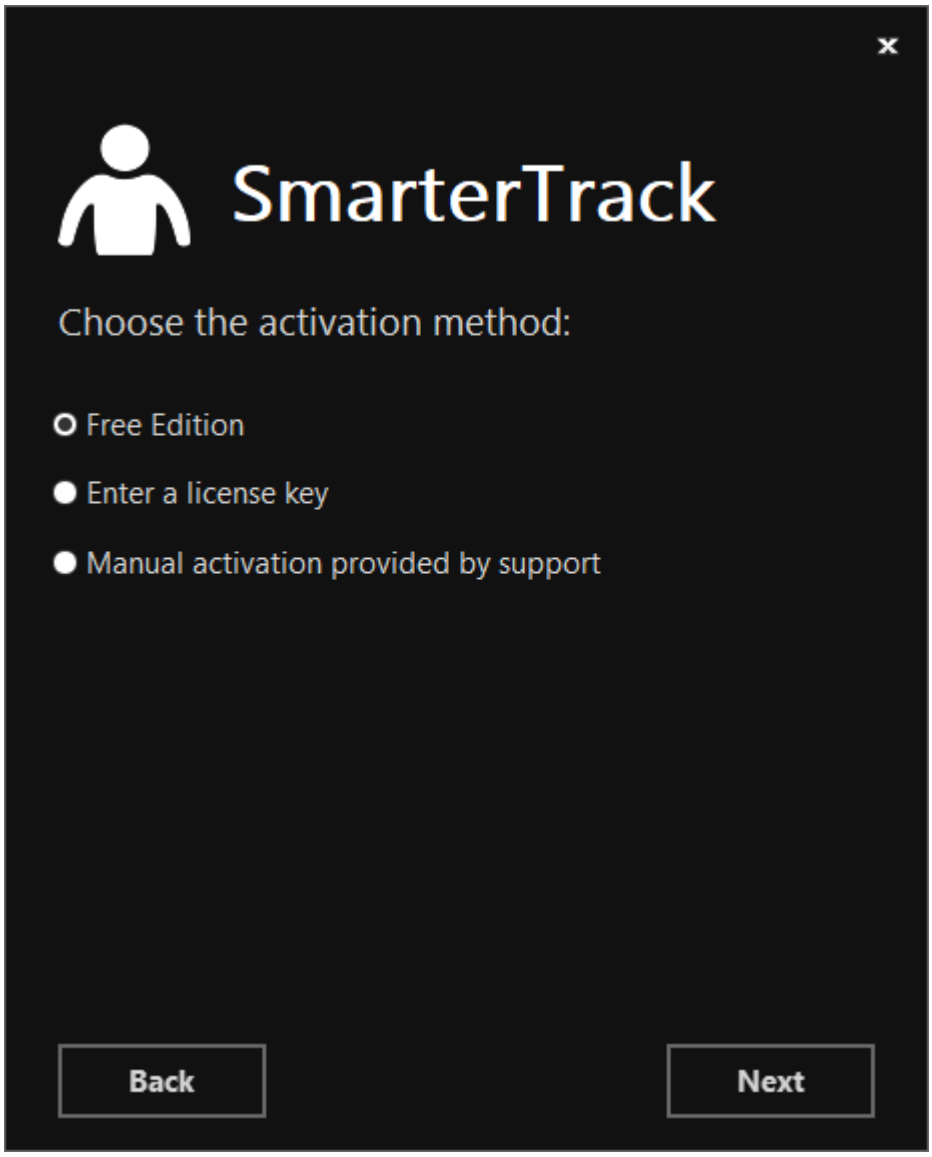
- Installation on a Shared Server
- Completely Uninstall SmarterTrack

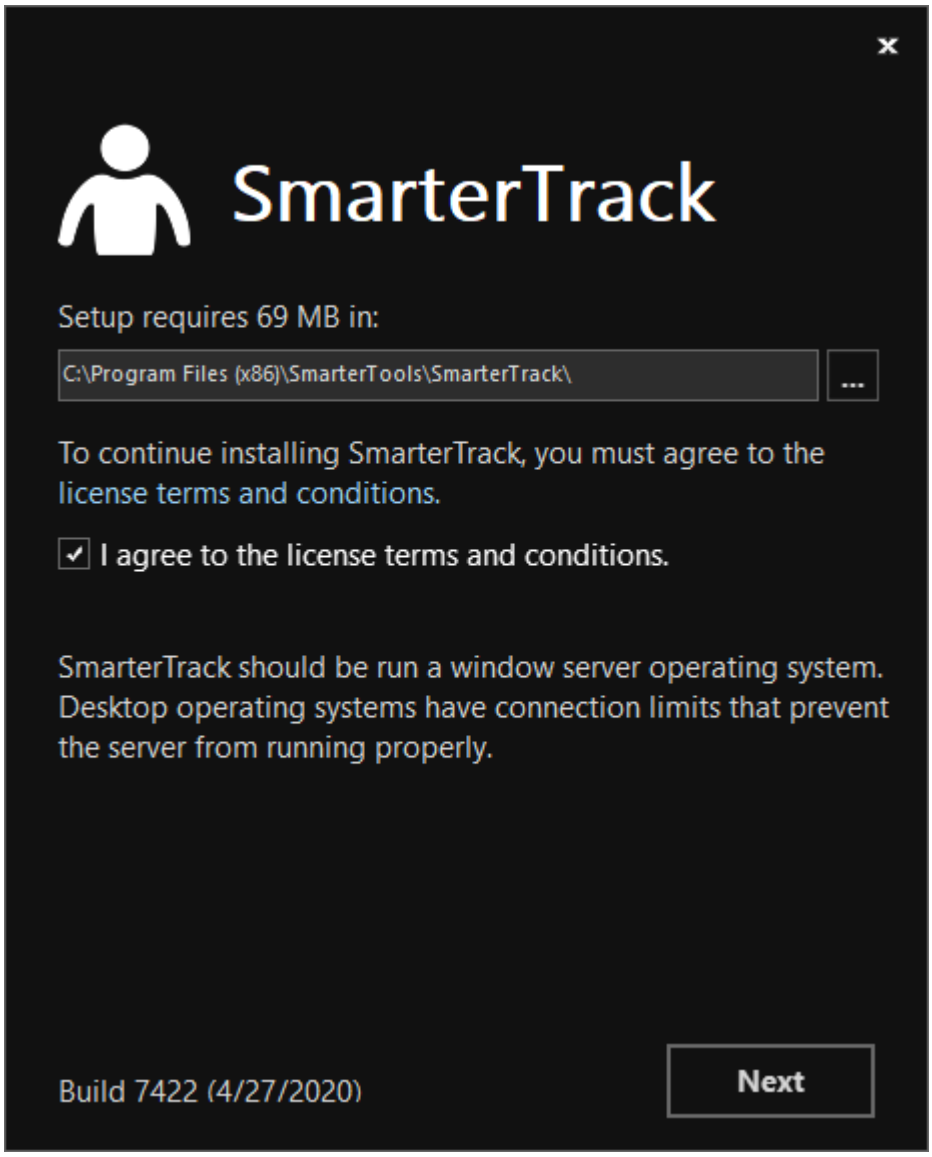
Installation on a Server

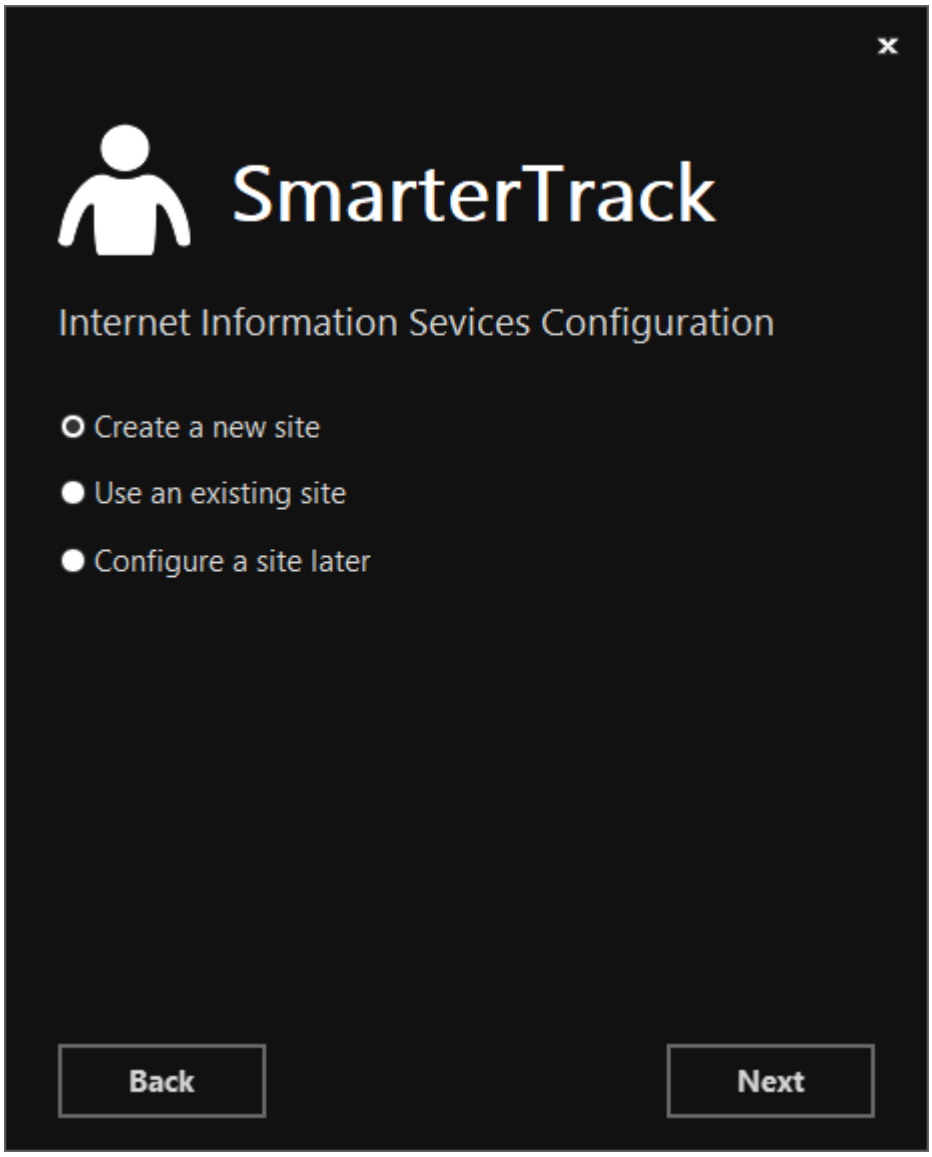
SmarterTrack starts by installing the overall application and application files. This is just like any standard program installation: you start the installation, select the path for the installation and then agree to the SmarterTrack license terms and conditions.

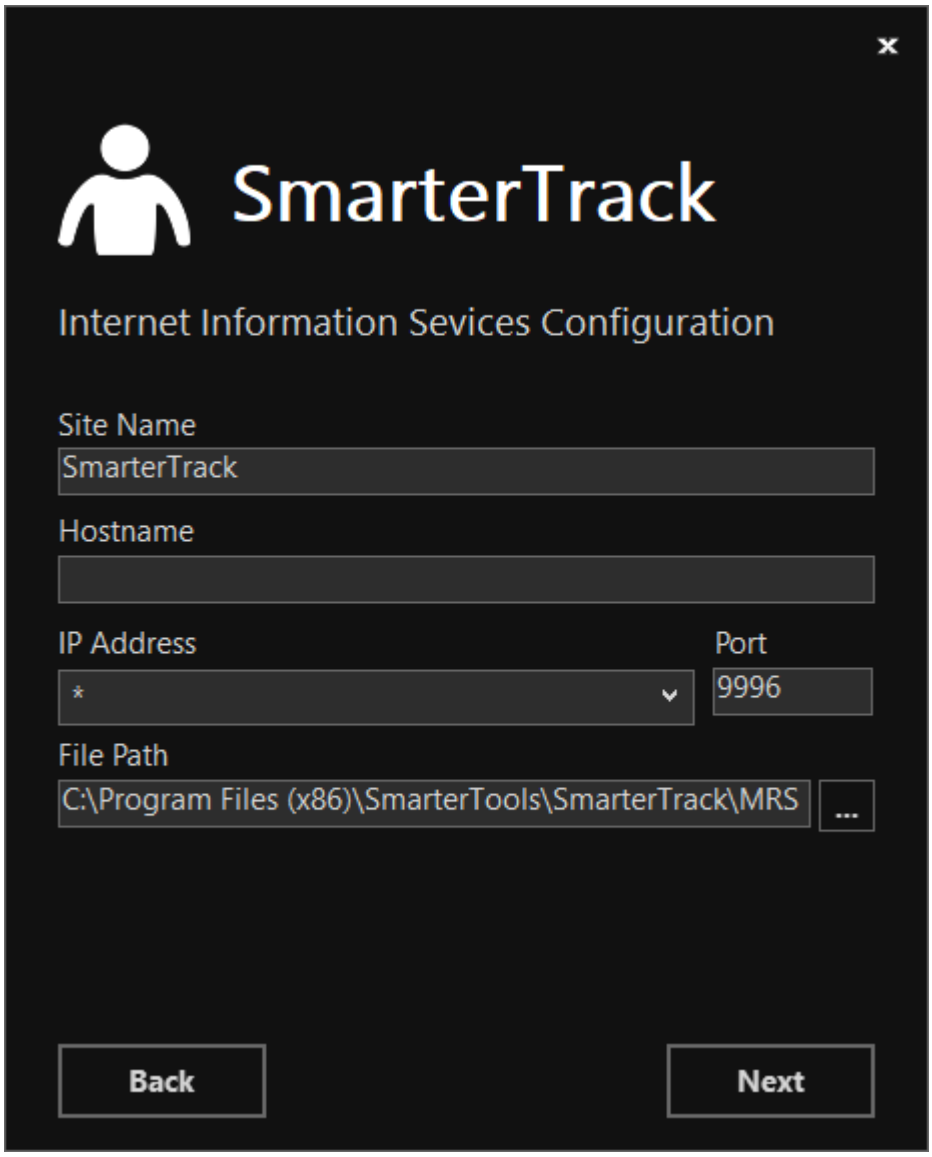
You'll be able to track the progress of the installation as SmarterTrack is configured on the server. Once the initial file installation occurs, the next step is walking through the IIS Configuration Tool. This installation process includes:

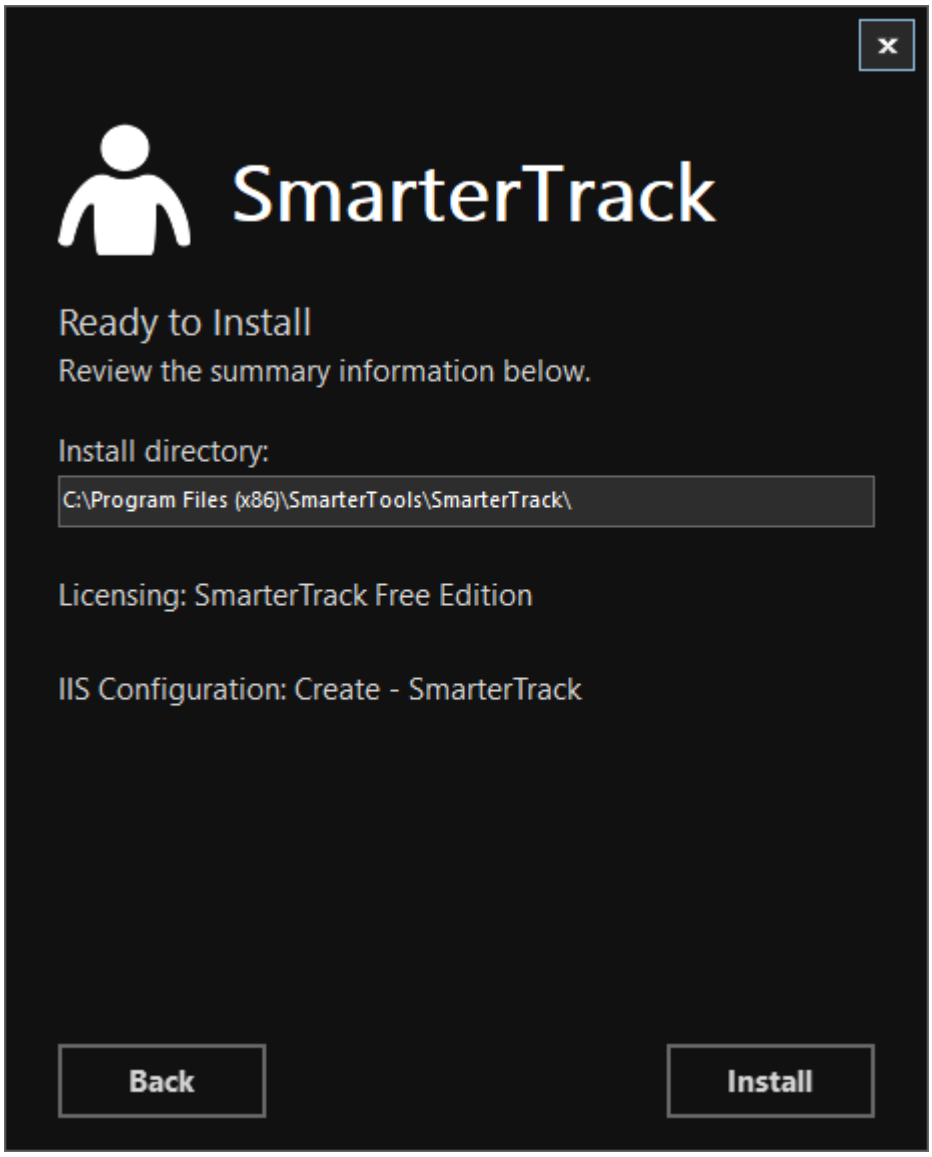
- Selecting your activation method. This includes whether you're installing the Free Edition, whether you have a license key or whether you've been given a manual activation from SmarterTools. Manual activations are used in circumstances where SmarterTrack will be used on an internal network that has no public access.• Next, you're presented with the default installation path and are asked to agree to the SmarterTools license terms and conditions.• Then, the installation process will verify that IIS is installed. If IIS isn't present, the installation will actually install IIS for you as it is a requirement for SmarterTrack.
- After the IIS check, a check is performed to see if a SmarterTrack site already exists on the server. If not, one can be created. If a site already exists, you can select that site and use it for your installation. Using an existing site is perfect for users who are simply upgrading their installation to the latest version.• If setting up a new site, you set the site name, set you your hostname, select the IP(s) to use for the installation and the file path for the Management and Reporting Server (MRS). If using an existing site, these steps are bypassed; you're asked to select the site you wish to use for the installation.• After setting up your new site, SmarterTrack will create an app pool using that site name, then set up a site in IIS that uses the new app pool.
- Next, the necessary permissions are set for the site.
- Finally, the installation is verified.• Once everything is verified, the Getting Started Wizard opens using the server's default browser. (If a default browser is not set, you'll be offered options on which browser to use.)


SmarterTrack
Choose the activation method:
Free Edition
Enter a license key
Manual activation provided by support
Back
Next


SmarterTrack
Setup requires 69 MB in:
C:\Program Files (x86)\SmarterTools\SmarterTrack\
...
To continue installing SmarterTrack, you must agree to the license terms and conditions.
I agree to the license terms and conditions.
SmarterTrack should be run a window server operating system. Desktop operating systems have connection limits that prevent the server from running properly.
Build 7422 (4/27/2020)
Next


SmarterTrack
Internet Information Sevices Configuration
Create a new site
Use an existing site
Configure a site later
Back
Next


SmarterTrack
Internet Information Sevices Configuration
Site Name
SmarterTrack
Hostname
IP Address
*
Port
9996
File Path
C:\Program Files (x86)\SmarterTools\SmarterTrack\MRS
...
Back
Next



Getting Started Wizard

The Getting Started Wizard is a simple, yet complete, process to get SmarterTrack up and running on a server. Using it, you walk through the following pages:

• Enter your license key. The first page allows you to activate your license key. If you don't have a license key, you can simply hit Next and the Free Edition will be activated.• Next, you set up or connect to a database. - As mentioned, SmarterTrack requires a database back end for storing tickets, live chats, KB articles and more. Therefore, part of the Getting Started process is telling SmarterTrack not just the type of database to use, but the database name as well. Regardless of which type of database you use, once your settings are input, and you hit the Next button, SmarterTrack will start running through the necessary SQL commands to start constructing the tables and relationships

necessary for SmarterTrack to run.• Next, you'll configure your installation. - After your database is set up, you'll then create your "Administrator / Employee", who will act as the Administrative account for your SmarterTrack installation as well as your first Employee. (If you want this account to ONLY act as the Administrator for SmarterTrack, you can remove the Agent Role from the account AFTER you have created additional Agents.) You will also add information about your company, such as your company name, a company logo, etc.• Installation complete! - Finally, you're ready to use SmarterTrack. The last page of the Getting Started Wizard offers up 2 areas to move to next: the Management Interface or the Portal. Regardless of where you go, you'll already be logged in with the Administrator / Employee account you created earlier. First, the Management Interface is where you'll go to begin adding in your Departments and Groups as well as additional Agents, as needed. For information on these items, and how to set up SmarterTrack to fit your particular needs, see the Company Organization page to see how certain types of businesses can organize their installation. Going to the Portal, you'll see your logo, company name and other company information displayed, as well as your Employee's name in a drop-down button. (Clicking that button will allow you to log into the Management Interface as well.) The Portal is where customers will go to submit tickets, start live chats, read knowledge base articles and more. It's the customer-facing part of SmarterTrack that your users will see.

1 License Setup 2 Database Setup 3 Configuration 4 Completed

SmarterTrack

License Setup

SmarterTrack will operate as the FREE Edition when a license key is not provided. The FREE Edition is limited to a single agent and provides all of the features found in the Enterprise Edition.

If you have a License Key, enter it below:

Help Next

1 License Setup 2 Database Setup 3 Configuration 4 Completed

SmarterTrack

Database Connection

A database is required to use SmarterTrack.

SmarterTrack can use Microsoft SQL Server (Express, Web, Standard or Enterprise Editions), MySQL Server or a MySQL equivalent such as MariaDB. For more information on how to install a database or about the database requirement, click on Help.

Server Type
Microsoft SQL Server

Server Name
localhost\SqlExpress

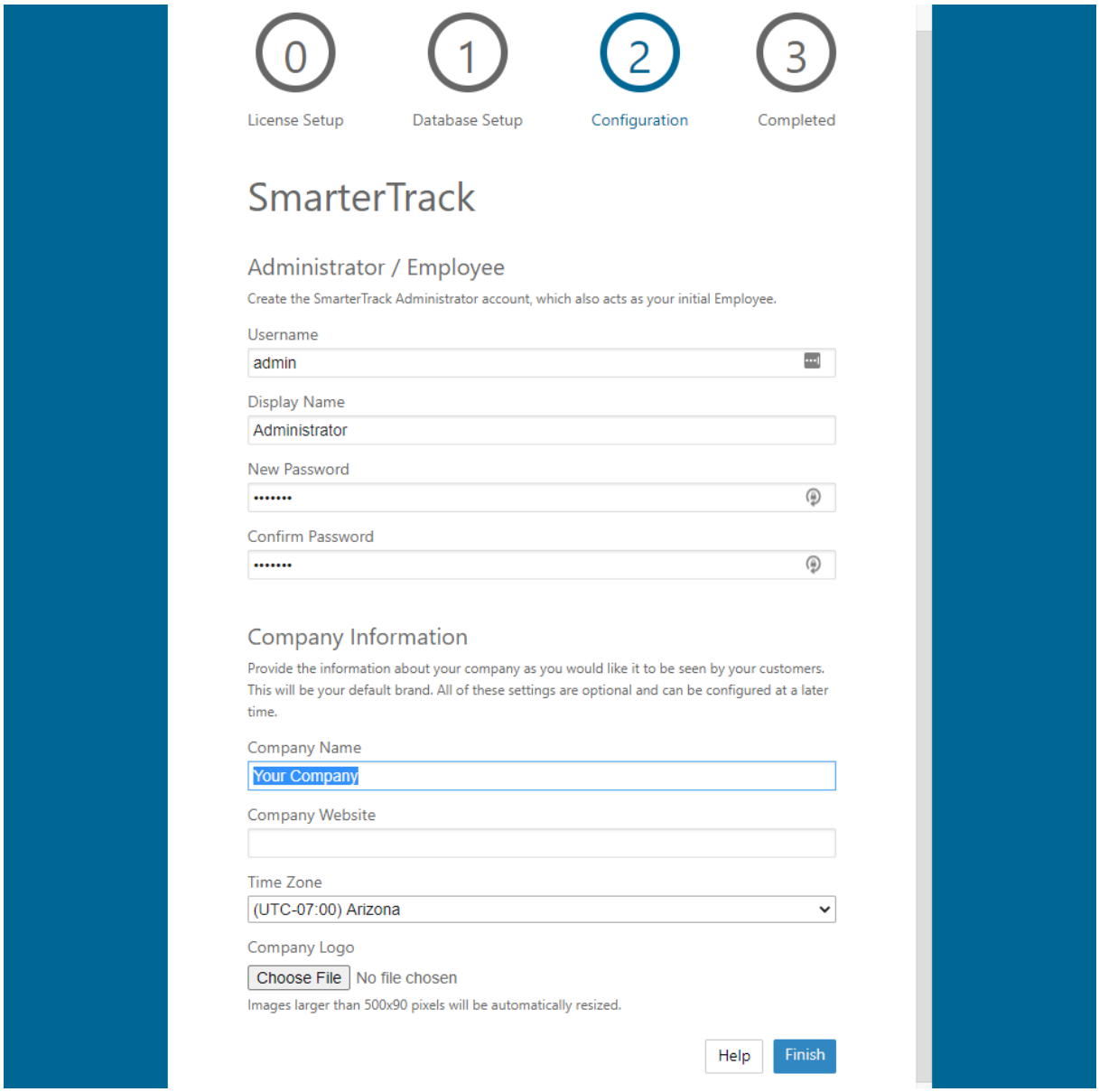
Authentication
Integrated Authentication

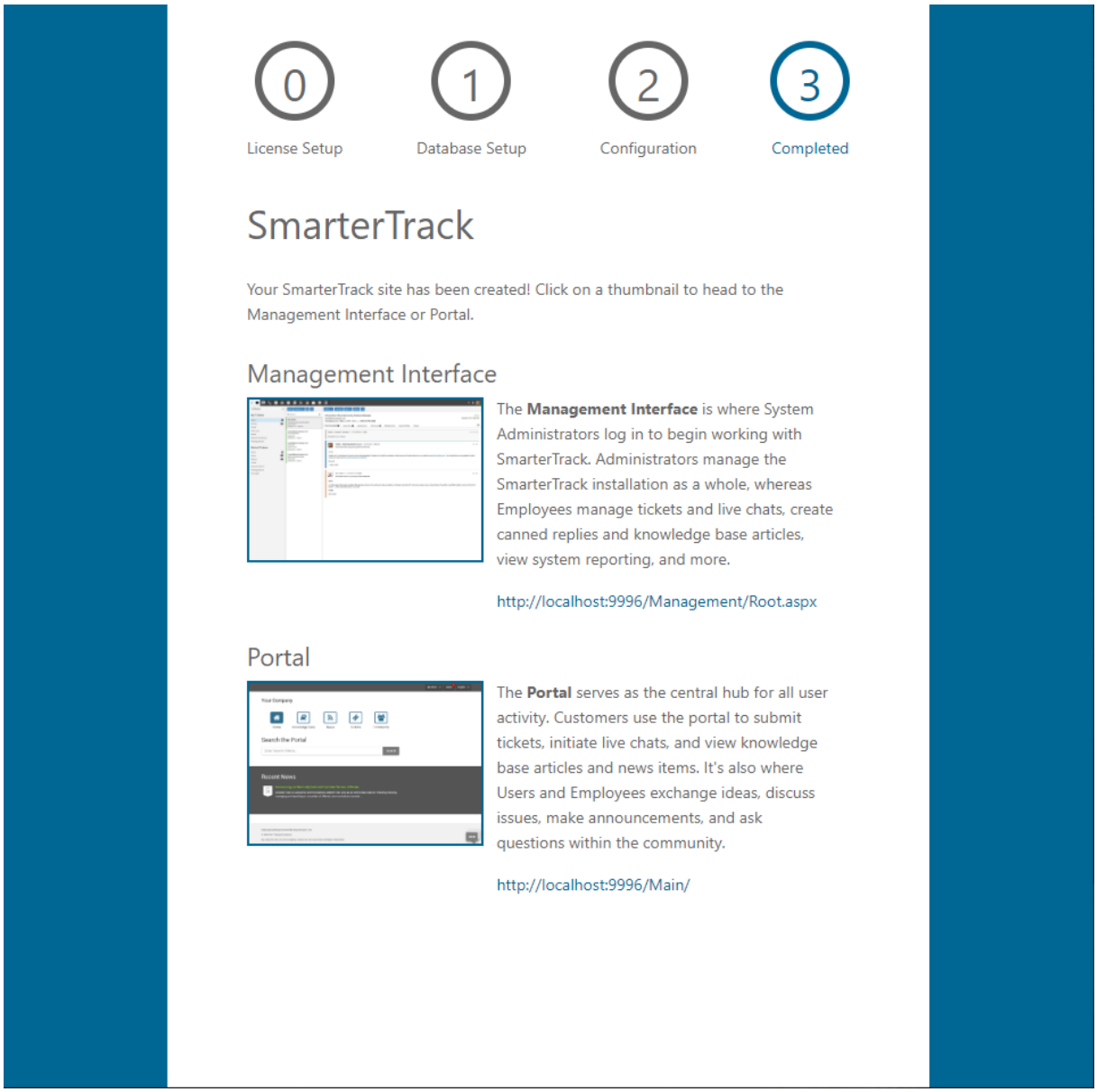
Username
WORKGROUP\DESKTOP-J556QJC$

Database Name
SmarterTrack

Table Name Prefix
st_

Help Next


0
License Setup
1
Database Setup
2
Configuration
3
Completed
SmarterTrack
Administrator / Employee
Create the SmarterTrack Administrator account, which also acts as your initial Employee.
Username
admin
Display Name
Administrator
New Password
Confirm Password
Company Information
Provide the information about your company as you would like it to be seen by your customers. This will be your default brand. All of these settings are optional and can be configured at a later time.
Company Name
Your Company
Company Website
Time Zone
(UTC-07:00) Arizona
Company Logo
Choose File
No file chosen
Images larger than 500x90 pixels will be automatically resized.
Help
Finish



Installation to a Shared Server

Before installing SmarterTrack in a shared hosting environment, make sure your environment meets the following requirements:

- Support for ASP.NET 4.7+.
- Hosting company allows for Full Trust ASP.NET 4.7+ applications.
- Access to Microsoft SQL Server 2012+ or MySQL 5.5 and higher.
- Server specifications meet the SmarterTrack System Requirements.

To install SmarterTrack in a shared hosting environment, you will need to complete the following steps:

- Download SmarterTrack files and upload them to your Web server.
- Verify file permissions.
- Set up your database.
- Complete the SmarterTrack Setup Wizard

Additional details regarding these installation steps are below.

Download SmarterTrack Files and Upload Them to Your Web Server

Follow these steps to complete the first phase of the installation process:

- Download the Manual Installer for SmarterTrack (MSI) from the SmarterTrack Download page.
- Then unzip the file to your computer's hard drive.
- Upload the extracted files to your Web server. If you are uploading these files to a subfolder (such as /SmarterTrack), make sure that this folder is an application starting point. NOTE: For more information on application starting points, please contact your hosting company.

Verify File Permissions

Make sure you set the following file permissions to complete the second phase of the installation process:

- The SmarterTrack/App_Data folder will require read, write, delete, and modify permissions to itself and all subfolders and files.
- The /SmarterTrack/Services folder will require the Execute Scripts permission.

NOTE: If you do not have the ability to change these permissions or if you have questions regarding these permissions, contact your hosting company for assistance.

Set Up Your Database

SmarterTrack requires the user of either Microsoft SQL or MySQL for its back end storage of ticket data, live chat data, etc. Therefore, prior to running the MSI you'll need to have a database set up on one of those 2 platforms.

Complete the SmarterTrack Setup Wizard

To set up SmarterTrack for the first time, you will be using the SmarterTrack Setup Wizard. Use a Web browser to navigate to the SmarterTrack URL and log in using the default system administrator (default login is "admin" for both username and password). The Setup Wizard will walk you through the connection and initialization of the database, the activation of the product, initial department and agent creation, and default SMTP configuration. Once these steps are completed, SmarterTrack will be installed and ready for use.

Completely Uninstall SmarterTrack

On occasion, a System Administrator may need to completely uninstall SmarterTrack. For example, if your help desk moves from an old server to a new one, the System Administrator may want to clean up the old server and re-purpose it for another use.

Follow these steps to completely uninstall SmarterTrack:

- Uninstall SmarterTrack using the Add/Remove Programs feature of Windows
- Delete the SmarterTrack software folder. By default, this folder is located at C:\Program Files (x86)\SmarterTools\. NOTE: If SmarterTrack is the only SmarterTools product installed on the server, the entire "SmarterTools" folder can be deleted.
- Delete the SmarterTrack website and application pool from within IIS.
- Finally, if SmarterTrack is no longer being used, it's possible to delete the database or schema associated with it. How you do this depends on the database being used: Microsoft SQL versus MySQL. However , if you're going to continue using SmarterTrack, but on a different server, the database should not be deleted .

All components of SmarterTrack have been removed from the server.

Database Options

These settings are not available to those using Hosted SmarterTrack.

SmarterTrack needs a database to store data. This includes your ticket data, chat data, KB articles and more. SmarterTools customers using an installed version of the software can run SmarterTrack with any of the database servers listed below.

Setting up the database is part of the overall installation process. If you're using Microsoft SQL, SmarterTrack will prompt you to automatically create a SQL database if it does not already exist prior to the table creation process. If a Microsoft SQL database is already present, that can be chosen in place of creating a new one. However, if you're using MySQL or a variant, the database will need to be set up FIRST, and then you will be asked to connect the SmarterTrack installation to the MySQL database you've created. Then SmarterTrack will connect to the database and populate the necessary tables.

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

Microsoft SQL Server is the recommended database to use for SmarterTrack. Express Edition is available at no cost and will support the vast majority of SmarterTrack customers. For those needing advanced services or large amounts of database storage, Web, Standard or Enterprise Editions are recommended. For best performance, it is recommended to use Microsoft SQL Server 2008 R2 or later. If possible, use of 64-bit is also recommended.

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

- SQL Server Product Information
- SQL Server Express Download

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

MySQL

MySQL can be used as a back-end database for SmarterTrack. MySQL Community Server can be freely downloaded and used for most customers. For those needing advanced service and support, or who have larger installations, MySQL offers a number of paid editions. Users should choose the version of MySQL that best fits their particular installation and usage scenarios. The 64-bit versions of MySQL 5.5 or later are strongly recommended.

In addition to the standard version of MySQL, variants such as MariaDB can be used as well. MariaDB is an open source variant of MySQL that was created by, and is maintained by, the original developers of MySQL.

For more information or to download MySQL, please see:

- The MySQL website
- The MySQL Editions page
- It's also recommended to download and install My SQL Workbench for the management of your MySQL databases. (However, command line can be used as well.)

Additional Information

For step-by-step instructions and more information regarding the database backend, please refer to the KB articles Set Up the SmarterTrack Database on a Dedicated Server or Set Up the Database for Shared Hosting .

Activating SmarterTrack

These settings are not applicable to those using Hosted SmarterTrack.

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

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

To activate or reactivate a valid license key, click Activate in the content pane toolbar. Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request.

Enabling SmarterTrack Communicator

SmarterTrack Communicator is available as an optional paid add-on to SmarterTrack and is associated to a specific SmarterTrack license key at the time of purchase. Once you have purchased the add-on, you will need to reactivate SmarterTrack before you can begin configuring VoIP accounts and using the Communicator.

Upgrading SmarterTrack

This information is not applicable to those using Hosted SmarterTrack.

Upgrading SmarterTrack is extremely easy to do. Since all of the files needed are contained with the installation files, the basic steps are to back up your current installation, uninstall the old version, then run the installer that was downloaded from our website. That's really all you need to do to upgrade to the most current version. However, we've listed the actual steps to follow below based on whether you use our automated installer (.exe) or the manual installer (.msi), which is generally used in situations where installations and upgrades are automated. (Note: If you have customized the web.config file, you can copy it to another location, then replace the default file with your modified version after upgrading.)

Using the Automated Installer (.exe)

Follow these steps to upgrade to the latest version of SmarterTrack using the automated installation package:

- Back up your SmarterTrack installation and database. The upgrade process should work just fine, but it's a best practice to always back up systems prior to upgrading them.
- If you are running SmarterTrack as an IIS site, stop the site and app pool in IIS prior to starting the upgrade process.
- Uninstall your current version of SmarterTrack using the Add/Remove Programs option in Windows. This will only uninstall system files - your users, employees, KB articles, etc. will remain intact and will be available after you re-install as long as you reconnect to the database you were using for your previous installation.
- Download and run the latest automated installer from the SmarterTrack Download page.

- The following steps are ONLY required if upgrading to a current Build from SmarterTrack 9.x or earlier. If not, Skip to Step 5
- Back up your installation, then upgrade to SmarterTrack 10.x. (You will need to contact sales@@smartertools.com to get installers for legacy versions of SmarterTrack.)
- Verify that the upgrade to 10.x went well by checking logins, tickets, events, etc.
- Back up your newly-upgraded 10.x installation.

• Proceed with these steps to upgrade to the most recent release. This is due to some back end and database changes made in SmarterTrack 10.x. Stair-stepping the installation this way speeds up the upgrade process and ensures a successful upgrade to the most recent release of SmarterTrack.
• Verify the installation path is the same as before. (The default installation location is C:\Program Files (x86)\SmarterTools\SmarterTrack.)
• Change IIS Application Pool to run as .NET 4.7+
• Restart the SmarterTrack site in IIS and the associated application pool.

Using the Manual Installer (.msi)

The steps for upgrading to the latest version of SmarterTrack using the manual installation package vary depending on whether you have access to IIS.

NOTE: If you're making a major version upgrade, it may be best to follow the instructions for using the automated installer to ensure any legacy files and/or folders are not cluttering up your installation and possibly causing issues.

Upgrading with Access to IIS

In general, if you are running SmarterTrack on a dedicated server or through VPS hosting, you will have access to IIS. If you have access to IIS on the server, follow these steps:

• Back up your SmarterTrack installation and database. If you made changes to the web.config file, copy it to an alternate location.
• Download the latest manual installer from the SmarterTrack Download page. (NOTE: If upgrading from SmarterTrack 9.x or earlier, you will want to upgrade to SmarterTrack 10.x FIRST, then upgrade to the latest release. Please contact sales@@smartertools.com for the MSI installers.)
• Extract the contents of the package to a temporary directory.
• Stop IIS or the Web application pool running SmarterTrack.
• In your current SmarterTrack site, delete all files and folders EXCEPT for App_Data or any other custom folders.
• Copy the files (including APP_DATA) from the SmarterTrack folder of the installation package into the site's location.
• If you made customizations to the web.config file in your previous installation, you

can now replace the default web.config with our modified version.

• Change SmarterTracks Application pool to run on .NET 4.7+

• Restart IIS or the Web application pool running SmarterTrack.

Upgrading without Access to IIS

In general, if you are running SmarterTrack through shared hosting, you will not have access to IIS. If you do not have access to IIS on the server, follow these steps:

• Back up your SmarterTrack installation and database. If you made changes to the web.config file, copy it to an alternate location.

• Download the latest manual installation package from the SmarterTrack Download page. NOTE: The manual installation package is the files for shared hosting download.

• Extract the contents of the package to a temporary directory.

• In your current SmarterTrack site, delete all files and folders EXCEPT for App_Data or any other custom folders.

• Copy all of the files (including APP_DATA) from the SmarterTrack folder of the installation package into the site's location.

• If you made customizations to the web.config file in your previous installation, you can now replace the default web.config with our modified version. NOTE: If you have not made any customizations to the web.config file, you will need to reset the IIS site by renaming the web.config file to web.config1, and then renaming it back to web.config.

SmarterTrack Failover Functionality

This information is not applicable to those using Hosted SmarterTrack.

Who Should Use This

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

Failover Overview

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

Understanding How Failover Functionality Works

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

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

SmarterTrack Database Server

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

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

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

SmarterTrack Data Storage

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

Setup of the Primary Server

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

- Download the SmarterTrack installation file from the SmarterTools website.
- Run the InstallShield Wizard.
- If you are installing SmarterTrack on a dedicated or shared server, please refer to the topic Installing SmarterTrack for step-by-step installation instructions for this environment.
- Set up the SmarterTrack database. For more information, see Setting Up the Database .
- Configure the server to store SmarterTrack data files on a shared drive. For more information, refer to the knowledge base article Store SmarterTrack Files on an Alternate Drive or SAN .
- Set up IIS. For more information, refer to the knowledge base article Set Up SmarterTrack as an IIS Site .
- Log into the SmarterTrack management interface as the primary administrator (if you are not logged in automatically). By default, the username is “admin” and the password is “admin.”
- Run the Database Connection Wizard.
- Run the Company Setup Wizard to begin setting up your company's agents, groups, departments, and brands.

Setup of the Secondary Server

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

- Install SmarterTrack on the secondary server.
- Set up IIS on the secondary server.

- Configure the secondary server to store SmarterTrack data files on the same shared drive as the primary server. For more information, see step 4 of the Setup of the Primary Server section.
- Log into the SmarterTrack management interface as the primary administrator (if you are not logged in automatically). By default, the username is “admin” and the password is “admin.”
- Click the Settings icon .
- Expand the Configuration folder and click Failover in the navigation pane. Note: These settings will only show if a SmarterTrack Enterprise with Failover license has been activated. Any servers on which this license of SmarterTrack has been activated will load in the content pane. To identify which server is the secondary server, look at the Status column. Any secondary servers will be listed as passive or disabled status.
- To enable the secondary server to act as a backup in the event the primary server fails, select the secondary server and click Enable in the content pane toolbar. The status of the secondary server will change to passive.

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

Manually Activating a Failover Server

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

- Log into the SmarterTrack management interface and click the Settings icon . Expand the Configuration folder and click Failover in the navigation pane. Select the desired server and click Set Active in the content pane toolbar to make the server the active server.
- Go to http://[yourSmarterTrackUrl]/ActivateNode.aspx on the server you wish to make active. Click the Activate Node button to make this server the active server.

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

Modifying Failover Servers

System administrators can add, delete or modify the status of a failover server at any time. Log into the SmarterTrack management interface and click the Settings icon . Expand the Configuration folder and click Failover in the navigation pane. Then make any necessary modifications.

SmarterTrack External Provider Technical Documentation

Who Should Use This Document

This document is intended for internal developers looking to extend or customize the functionality of SmarterTrack's login system or ticket and live chat submission process. SmarterTrack users should note that the use of external providers is an advanced feature that requires programming knowledge. To download a sample application, download this sample external provider .

External Providers Overview

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

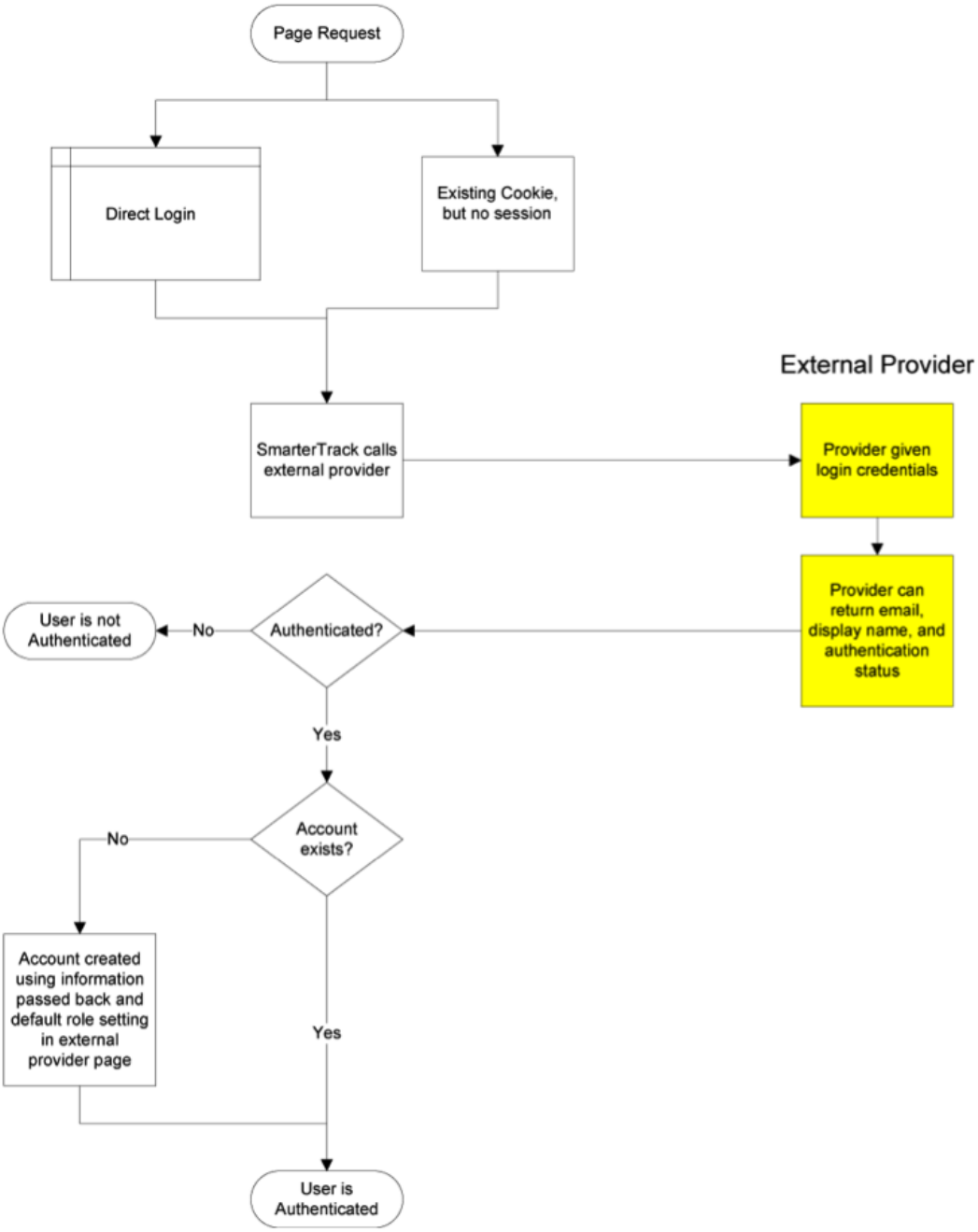
In order for your external provider to work in SmarterTrack, the Web service(s) need to follow a specific interface. The external providers discussed in this document utilize the following interfaces:

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

Multiple external providers can be created in the same Web service as long as the required interfaces are inherited. The interfaces needed for these external providers can all be found in the SmarterTrack.Connector DLL. This file may be included in and distributed with your installation package.

Login Provider

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



Authenticate Method

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

- Parameters :

- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)

- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The username you are authenticating with
- LoginPassword :The password you are authenticating with

- Return Type :ExternalLoginProviderResult

- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

- Authentication :Determines whether or not the authentication check succeeded. Possible values are OK or FAIL
- EmailAddress :The email address of the user
- DisplayName :The display name of the user

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

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

```
// This function is used to authenticate user credentials when they log in to the interface. // The return values are used to create and link an account from SmarterTrack into your system. // // // Inputs // authPW = Validates that calling software is valid // loginUsername // loginPassword // Outputs // Authentication = OK or FAIL // EmailAddress = Email address of user // DisplayName = Display Name of User [WebMethod] public ExternalLoginProviderResult Authenticate(ExternalLoginProviderInputs inputs) { ParsedLoginInputData iData = new ParsedLoginInputData(inputs); ExternalLoginProviderResult result; // Verify that all necessary criteria to call this function are met if (iData.WebServiceAuthorizationCode != WebServicePassword) return new ExternalLoginProviderResult(false, "Permission Denied"); if (string.IsNullOrEmpty(iData.LoginUsername) || string.IsNullOrEmpty(iData.LoginPassword)) return new ExternalLoginProviderResult(false, "Required Input Missing"); // This is a sample of how to do a basic username/password check (use your own database or list here) if (iData.LoginUsername.ToLowerInvariant() == "myusername" && iData.LoginPassword.ToLowerInvariant() == "mypassword") { result = new
```

ExternalLoginProviderResult(); result.Success = true; result.Message = "Login Successful"; result.OutputVariables.Add("Authentication=OK"); result.OutputVariables.Add("EmailAddress=putUsersEmailAddressHere@@example.com"); // optional result.OutputVariables.Add("DisplayName=putUsersFullNameHere"); // optional return result; } // Below is a sample Active Directory Authentication implementation //string[] unDomainUsernameSplit = loginUsername.Split(new char[] { '/', '\\' }, 2); //if (unDomainUsernameSplit.Length == 2) //{ // if (LDAP.AuthenticateLogin(unDomainUsernameSplit[0], unDomainUsernameSplit[1], // loginPassword, LDAP.NetworkType.ActiveDirectory) == LDAP.LDAPResult.Authenticated) // { // return new ExternalLoginProviderResult(true, "Login Successful", "Authentication=OK"); // } //} // Return a failure if there's no match return new ExternalLoginProviderResult(true, "Login Failure", "Authentication=FAIL"); }

GetSignInCookieInfo Method

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

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

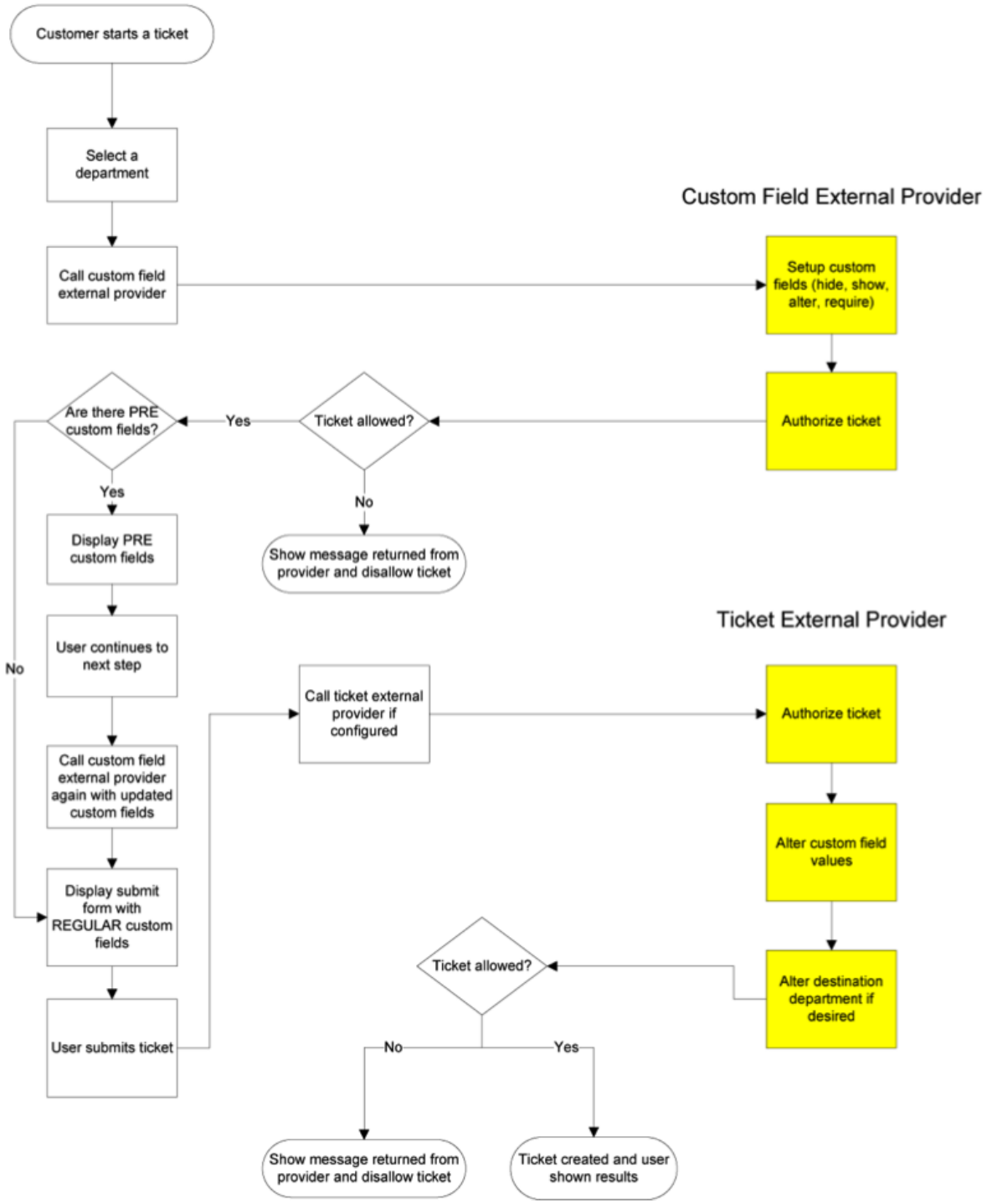
- Authentication :Determines whether or not the authentication check succeeded. Possible values are OK or FAIL
- EmailAddress :The email address of the user
- DisplayName :The display name of the user
- cf_* :The value of current custom fields. An example of a custom field would be cf_ticket type=phoneticket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

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

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

CustomFieldProvider

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



GetCustomFieldOptions Method

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

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

- Parameters :

- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)

- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The customer's username
- DepartmentName :The department name that the Ticket or Live Chat is being started through
- Location :This is the step that the user is currently on in the Ticket or Live Chat submission process. Possible values for this are PRE or REGULAR
- cf_* :Value of current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. These values would obviously be empty if you were on step 1 of the submission process (location=PRE)

- Return Type :ExternalCustomFieldProviderResult

- Message :A message indicating the result of the Web service call
- Success :A Boolean value indicating the result of the Web service call
- CustomFieldDataItems :A generic list of properties that will tell SmarterTrack which action(s) to take with each individual custom field

- CustomFieldName :This is the identifier for the custom field being changed. This value must be identical to the name of the custom field in SmarterTrack
- DisplayWithInformationLookup :A Boolean value that indicates whether or not this

field should be displayed on the first step of the ticket or live chat submission process. If this value is set to false, this custom field will be displayed with the other custom fields on the regular submission page (location=NORMAL)

• ChangeListOptions :A Boolean value that indicates whether or not a drop-down type custom field should have its list options changed. This works alongside the ListOptions property below

• ListOptions :A generic list of strings that is used to overwrite the contents of a drop-down menu type custom field. These values will only be used if ChangeListOptions is set to true

• ChangeRequired :A Boolean value that indicates whether or not the custom field should have its required status changed. This works alongside the NewRequiredValue property

• NewRequiredValue :A Boolean value that is used to determine if this custom field should be marked as required. This value is only used if ChangeRequired is set to true

• ChangeVisible :A Boolean value that indicates whether or not the custom field should have its visibility changed. The works alongside the NewVisibleValue property

• NewVisibleValue :A Boolean value that is used to determine if this custom field should be visible to the user. This value is only used if ChangeVisible is set to true

• OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

• CanStartTickets :Determines whether or a not a ticket can be started. Possible values for this are true and false. If this value if false,

• CanStartChats : Determines whether or a not a live chat can be started. Possible values for this are true and false. If this value if false, SmarterTrack will display an error message to the user

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

// Inputs // authPW = Validates that calling software is valid // loginUsername // departmentName // location = PRE or REGULAR (pre called after department selection made. Regular called after search page and before compose page) // cf_* = value of current custom fields, such as "cf_ticket type=phone

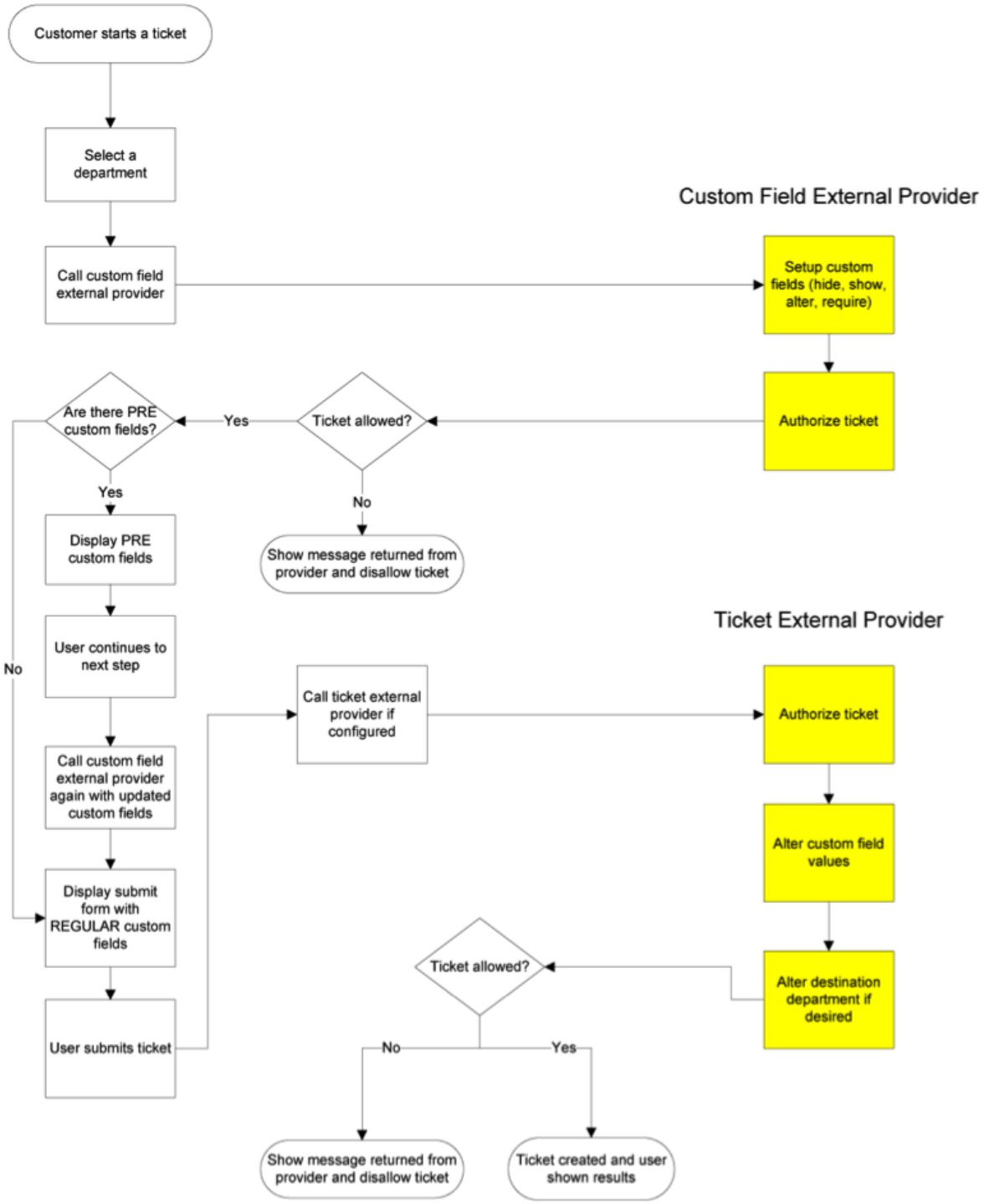
ticket" // Outputs // CanStartTickets = true or false // CanStartChats = true or false // Custom field overrides [WebMethod] public ExternalCustomFieldProviderResult GetCustomFieldOptions(ExternalCustomFieldProviderInputs inputs) { ParsedCustomFieldInputData iData = new ParsedCustomFieldInputData(inputs); // Verify that all necessary criteria to call this function are met if (iData.WebServiceAuthorizationCode != WebServicePassword) return new ExternalCustomFieldProviderResult(false, "Permission Denied"); bool canStartTickets = true; bool canStartChats = true; ExternalCustomFieldProviderResult result = new ExternalCustomFieldProviderResult(true, "Result okay"); ExternalCustomFieldData cfdata; #region Example: Allow tickets/chats to only certain customers /* * You could check a database and see if the user has the ability to contact certain departments, for example. * In this example, only the user "myusername" is allowed to start tickets and chats for all departments. * Everyone else can only start chats (not tickets), and can only contact the sales department */ //if (iData.LoginUsername == "myusername") //{ // canStartTickets = true; // canStartChats = true; //} //else //{ // result.Message = "You are not currently permitted to contact that department."; // shown in ticket pages // canStartTickets = false; // if (iData.DepartmentName.ToUpperInvariant() == "SALES DEPARTMENT") // canStartChats = true; // else // canStartChats = false; //} #endregion #region Example: Set a custom list of domains for them to choose from /* * This example shows how to fill custom field drop-down lists for the user based on their login. In this case, * we fill a dropdown list with their accounts listed in our database, so that they can choose which one * the support is for. * * It is important that the custom field already exist in SmarterTrack * */ //if (iData.DisplayLocation == DisplayLocations.Page1_Pre && iData.DepartmentName.ToUpperInvariant() == "SUPPORT DEPARTMENT") //{ // // Here you would look up the options. For now, we'll assume we brought back abc.com and def.com from our database

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

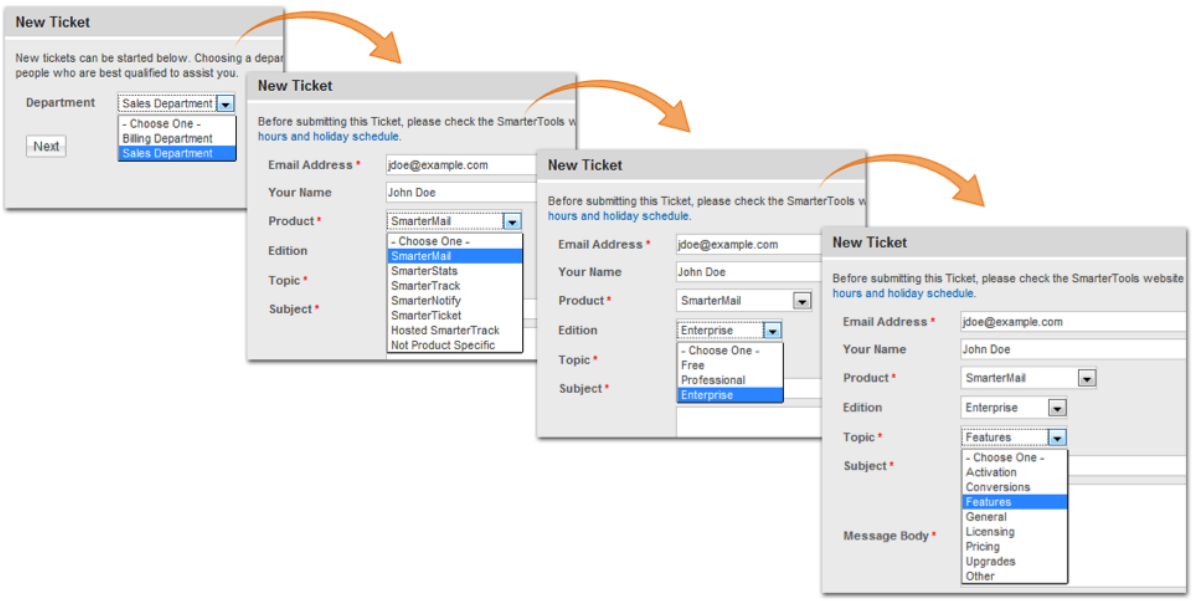
```
cfdata.ListOptions.Add("Questions about plans"); // cfdata.ListOptions.Add("Questions about features"); // cfdata.ListOptions.Add("Help finding a product"); //} //else if (iData.DepartmentName.ToUpperInvariant().IndexOf("SUPPORT") != -1) //{ // cfdata.ListOptions.Add("Web site issues"); // cfdata.ListOptions.Add("Database issues"); // cfdata.ListOptions.Add("Email issues"); // cfdata.ListOptions.Add("Dedicated server issues"); // cfdata.ListOptions.Add("Statistics issues"); // cfdata.ListOptions.Add("Network connectivity"); //} //else //{ // // Removing issue types field, since there's no options // cfdata.ChangeRequired = true; // cfdata.NewRequiredValue = false; // cfdata.ChangeVisible = true; // cfdata.NewVisibleValue = false; //} //result.CustomFieldDataItems.Add(cfdata); #endregion result.Success = true; result.OutputVariables.Add("CanStartTickets=" + canStartTickets); result.OutputVariables.Add("CanStartChats=" + canStartChats); return result; }
```

Ticket Tracking Provider

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



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



StartTicket Method

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

- Parameters :

- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)

- AuthPW :Used for validating if the calling software is valid
- LoginUsername :The customer's username. This is used for tickets submitted through the Web interface
- EmailFrom :The customer's email address. This is used for tickets submitted through email.
- DepartmentName :The department's name that the customer is creating a Ticket for.
- TicketNumber :The ticket number for the ticket about to be created.
- cf_* :Value of this Ticket's current custom fields. An example of a custom field would be cf_ticket type=phoneticket or cf_display name=Test. At this point in the ticket submission process these values should be completed.

- Return Type :

• Message :A message indicating the result of the Web service call
• Success :A Boolean value indicating the result of the Web service call
• OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

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

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

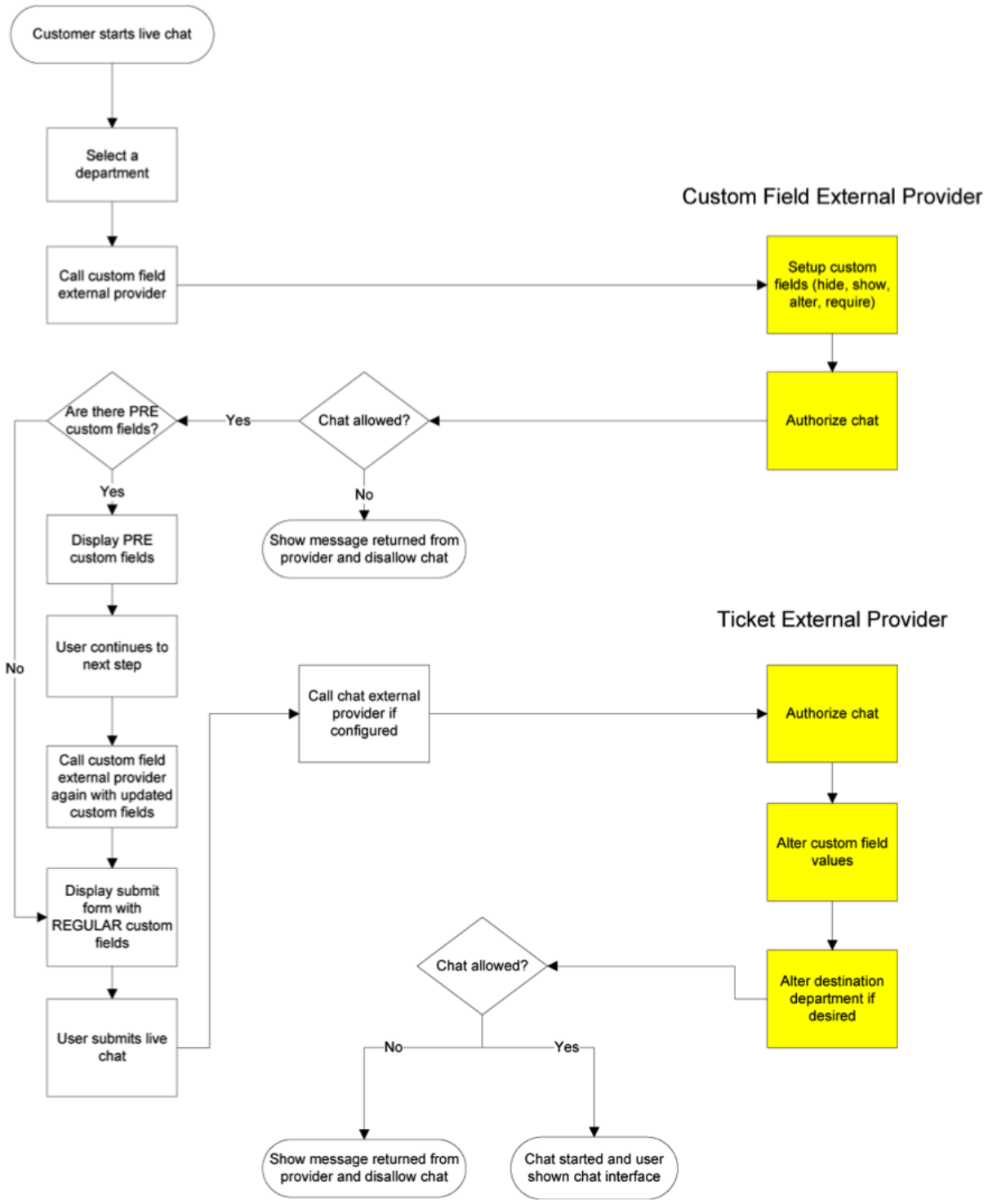
// This function is called right after the person clicks on the Submit Ticket button. This gives your provider one last // chance to abort the process or store any custom fields. // // Inputs // authPW = Validates that calling software is valid // loginUsername (for tickets submitted through Web interface) // emailFrom (for tickets submitted through email) // departmentName // subject // ticketNumber = the ticket number about to be created // cf_* = values of custom fields // Outputs // TicketCreation = TRUE or FALSE // cf_* = output values of custom fields [WebMethod] public ExternalTicketProviderResult StartTicket(ExternalTicketProviderInputs inputs) { ParsedTicketInputData iData = new ParsedTicketInputData(inputs); ExternalTicketProviderResult result = new ExternalTicketProviderResult(); // Verify that all necessary criteria to call this function are met if (iData.WebServiceAuthorizationCode != WebServicePassword) return new ExternalTicketProviderResult(false, "Permission Denied"); // This would be the place to check custom fields and the person's account to see if they can // submit tickets. If they can, and you use a pay-per-

ticket model, deduct the ticket from // the person's account here. // For example, to return an error that the person is out of support tickets, use the following code // return new ExternalTicketProviderResult(true, "There are no more tickets in your account.", "TicketCreation=FALSE"); #region Example: Set the customer's custom fields /* * In this example, we set some hidden custom fields based on the logged in user's information. These * custom fields MUST exist already in SmarterTrack (without the cf_ prefix) * */ //if (iData.LoginUsername.ToLowerInvariant() == "myusername") //{ // result.OutputVariables.Add("cf_Billing ID=4126"); // result.OutputVariables.Add("cf_Plan Type=ASP.NET Semi-dedicated"); //} #endregion #region Example: Reroute tickets /* * In this example, we reroute any tickets with the subject containing Urgent to the Critical Support department. * We also reroute any tickets with a custom field value of "Server Down" to the Server Operations Department * (assuming we had that custom field set up in our system). * You could also modify this to reroute customers with certain attributes in your database (priority customers). * */ //if (iData.Subject.ToUpperInvariant().Contains("URGENT")) //{ // result.OutputVariables.Add("departmentName=Critical Support"); //} //string value; //if (iData.CustomFields.TryGetValue("Issue Type", out value) && value.ToUpperInvariant() == "SERVER DOWN") //{ // result.OutputVariables.Add("departmentName=Server Operations Department"); //} #endregion

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

Live Chat Tracking Provider

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



StartChat Method

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

• Parameters :

• Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)

• AuthPW :Used for validating if the calling software is valid
• LoginUsername :The customer's username. This is used for live chats submitted through the Web interface
• DepartmentName : The department's name that the customer is starting a live chat for
• cf_* :The value of the live chat's custom fields. An example of a custom field would be cf_chat type=support or cf_display name=Test. At this point in the live chat submission process these values should be completed.

• Return Type : ExternalCustomFieldProviderResult

• Message :A message indicating the result of the Web service call
• Success :A Boolean value indicating the result of the Web service call
• OutputVariables :A generic list of strings containing several output parameters needed by SmarterTrack. Some of the output is required in order to make SmarterTrack work correctly with this method. Each object in the list is stored in a specific format (variable=value)

• ChatCreation : Determines whether or a not this live chat can be created. Possible values for this are true and false. If this value if false, SmarterTrack will display an error message to the user and will NOT start the live chat
• departmentName :If this value is set, the live chat will be created for this department instead of what the user submitted originally
• cf_* :Value of this live chat's current custom fields. If these values are set, they will replace any existing values for the custom field

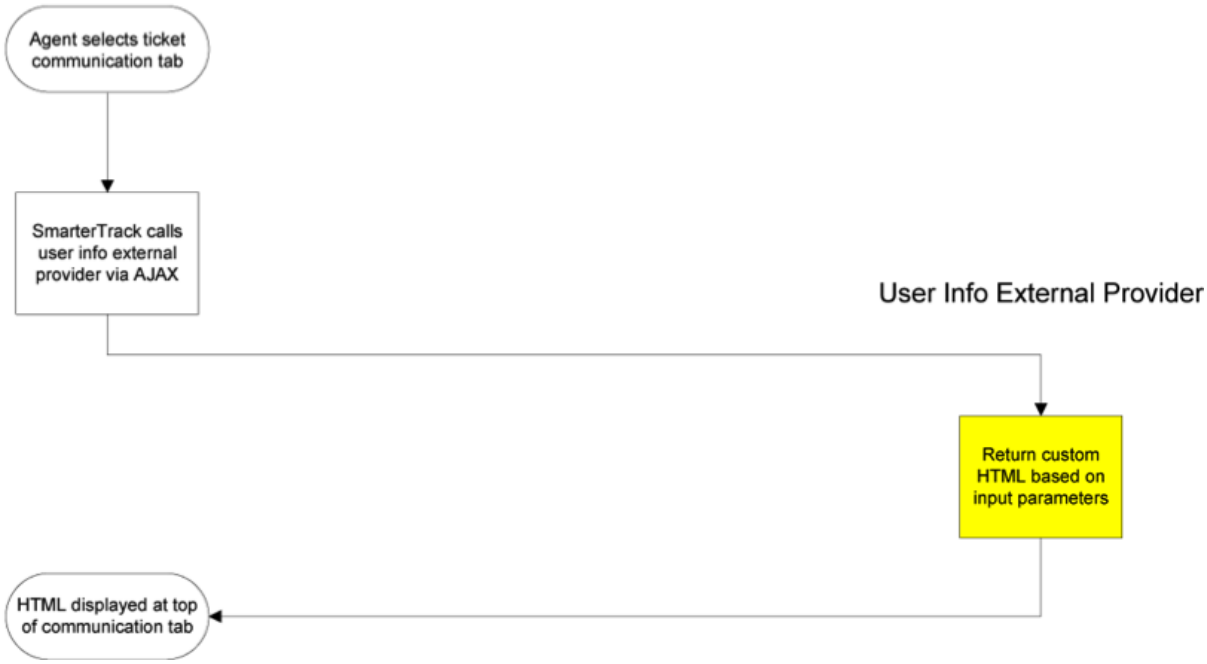
Here is an example of how the StartChat method is used:

// This function models the StartTicket function almost exactly. It is provided so you can make the processes run differently // for each. // // Inputs // authPW = Validates that calling software is valid // loginUsername (for chats submitted through Web interface) // emailFrom (for chats submitted through email) // departmentName // cf_* = values of custom fields // Outputs // ChatCreation = TRUE or

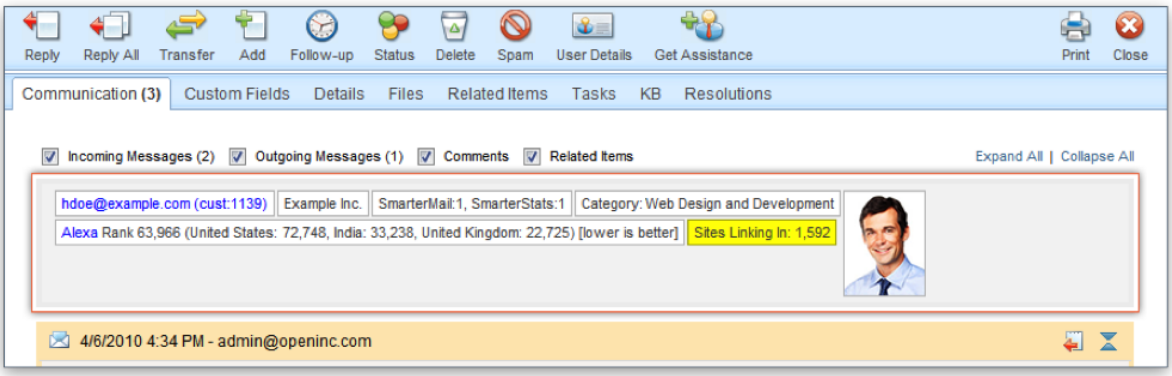
FALSE // cf_* = output values of custom fields [WebMethod] public ExternalChatProviderResult StartChat(ExternalChatProviderInputs inputs) { ParsedChatInputData iData = new ParsedChatInputData(inputs); ExternalChatProviderResult result = new ExternalChatProviderResult(); // Verify that all necessary criteria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

User Information Provider

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



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



GetUserDetails Method

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

- Parameters :
- Inputs :An object containing a generic list of string values. Each object in the list is stored in a specific format (variable=value)

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

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

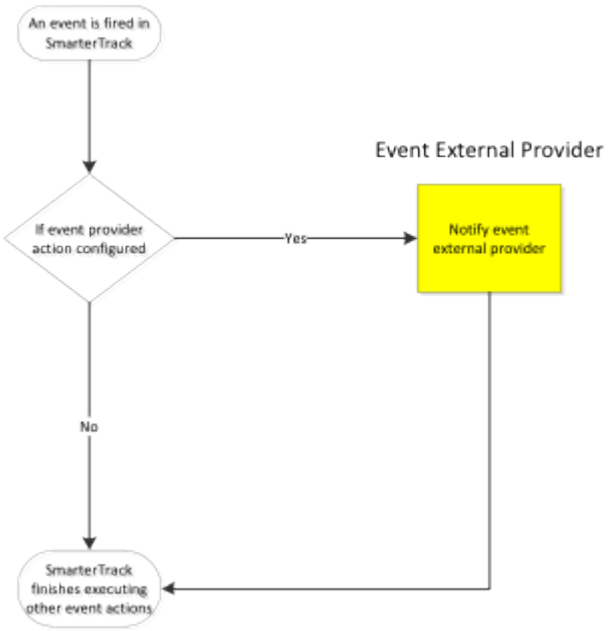
Here is an example of how the GetUserDetails method is used:

// This function is called when a Ticket is viewed in the management interface. // If values are returned for OtherUserInfo a user // information area will appear just above the conversation. In the future, this function may // also be used to retrieve information // for Live Chats and in the users settings page. // // Inputs // authPW = Validates that calling software is valid // username = The username for the account you are retrieving information for // email = The email address for the user you are retrieving information for // brandName = The brand that the Ticket was created in // departmentName = The department that the Ticket was created in // groupName = The group that the Ticket was created in // ticketNumber = the identifier for the Ticket you are retrieving information for // interactionType = Where this call is being made from // Outputs // UserInfoHtml = The HTML that will be displayed just above the conversation of a ticket // OutputVariables = An array of other information pertaining to the user. // This functionality isn't currently supported. [WebMethod] public

ExternalUserInfoProviderResult GetUserDetails(ExternalUserInfoProviderInputs inputs) { ParsedUserInfoInputData iData = new ParsedUserInfoInputData(inputs); ExternalUserInfoProviderResult result = new ExternalUserInfoProviderResult(); // Verify that all necessary criteria to call this function are met if (iData.WebServiceAuthorizationCode != WebServicePassword) return new ExternalUserInfoProviderResult(false, "Permission Denied"); // This would be the place to check account information and add custom user information and HTML #region Example: Add a user's account number /* * if (iData.Username.ToLowerInvariant() == "myusername") * { * result.UserInfoHtml = "Account Number: 000-000000-0000 Partner: Yes"; * } */ #endregion result.Success = true; result.Message = "User Account Information Retrieved Successfully"; // result.OutputVariables is unused at this time return result; }

Events Provider

The events provider is used to perform custom actions when an event action occurs. SmarterTrack's event system can be configured to fire this provider with details of the event and its conditions. This provider is useful for businesses that wish to notify another system or database of any action taken in SmarterTrack. The event provider utilizes the IExternalEventProvider interface. For a better understanding of how the event provider works with SmarterTrack, please refer to the flow chart below:



NotifyEventFired Method

The NotifyEventFired method is used to notify another system or database when an event is

fired in SmarterTrack. This method is called on any event where the “Notify External Provider” event action is configured. This event action is only available for system level events.

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

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

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

SmarterTrack Event Type Identifications

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

Event Type	ID
KB Article Created	501000
KB Article Modified	501001

KB Article Flagged For Review	501002
KB Article Stale	501003
KB Article Marked As Reviewed	501004
KB Article Deleted	501005
Ticket Created	502000
Ticket Transferred	502001
Ticket Status Changed	502002
Ticket Priority Changed	502003
Ticket Deleted	502004
Ticket Comment Added	502005
Ticket Message Sent	502006
Ticket Idle	502008
Ticket Count Department	502009
Ticket Count Group	502010
Ticket Count Agent	502011
Ticket Follow Up Scheduled	502012
Ticket Followed Up	502013
Ticket Time Log Created	502014
WhosOn Chat Accepted	503001
WhosOn Chat Invited	503002
WhosOn Chat Invite Rejected	503003
WhosOn Chat Invite Ignored	503004
WhosOn Visitor Removed	503005
WhosOn Visitor Purged	503006
WhosOn Online Activity	503007
Chat Channel Joined	505000
Chat Channel Left	505001
Chat Channel Invited	505002
Survey Answered	506000
Survey Offered	506001
Task Created	507000
Task Modified	507001
Task Deleted	507002
Task Started	507003
Task Due	507004
Task Comment Added	507005
Call Log Created	508000
Call Log Modified	508001
Call Log Deleted	508002
Call Log Attached To Ticket	508003
Call Log Detached From Ticket	508004
Call Log Time Log Created	508005

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

Connecting SmarterTrack to an External Provider

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

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

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

Any other settings are optional.

Automation with Web Services

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

Web services are intended for use by high-volume and automated business environments and hosting companies as they develop procedures to manage their SmarterTrack system and workflow. In addition, the API Documentation assumes a basic understanding of web service technologies and ASP.NET programming.

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

Integrations

SmarterTrack/WHMCS Addon Module

WHMCS is an all-in-one client management system that is popular with WHM/CPanel users. With the SmarterTrack module, you can completely override the basic support system inside of WHMCS, allowing you to use SmarterTrack -- either an on-prem version of SmarterTrack or the SmarterTrack Hosted Service -- to manage support tickets, live chats and knowledge base articles. This will also allow your support staff to manage your clients within the SmarterTrack interface without having to jump back and forth between WHMCS and SmarterTrack.

The WHMCS module is an open source module developed in PHP and can be used with both installed and hosted solutions of SmarterTrack.

NOTE: The WHMCS module provides a one-way sync from WHMCS to SmarterTrack. Any changes made within SmarterTrack will NOT be reflected in WHMCS.

Package Goals

The primary goal for the SmarterTrack/WHMCS module is to eliminate the multi-platform maintenance for customer support agents in a business. Agents can maintain support issues inside of SmarterTrack without having to worry about WHMCS at all. The WHMCS module provides the following:

- The ability to override the knowledge base links within WHMCS to redirect to SmarterTrack's knowledge base articles
- The ability to provide live chat support links within WHMCS that will pop up a SmarterTrack live chat within the WHMCS interface
- The ability to override the “contact us” email to start a ticket within SmarterTrack rather than an email to a chosen email address. The ticket will also have a different comment added to it that states it was submitted via Sales Acquisition. You get to specify which department these tickets are automatically submitted to.
- Full email ticket support, including:

- Include / exclude departments based on settings within SmarterTrack
- Full custom field support
- A comment added to every ticket submitted to show it was created through WHMCS
- Customizable auto responders with the ability to direct ticket links to WHMCS rather than SmarterTrack
- View all tickets on the support tickets page and all open tickets on client area page
- Restrict users from closing tickets based on settings set in SmarterTrack
- Help phone number and / or email address to be displayed on error pages
- Full email / username and password support. This means that whenever a client changes their email or password in WHMCS, the change will also reflect within SmarterTrack
- A page in the management interface of WHMCS for syncing SmarterTrack and

WHMCS users. (SmarterTrack uses the client's email address for the username)

• Full open source module with language string overrides, a custom style sheet and custom client template pages that can all be modified to serve a company's needs

Installation and Configuration

The WHMCS module has multiple versions available that can be used with existing installations of SmarterTrack 8.5 and above and WHMCS 5, 6 or 7. For information on installing and configuring the WHMCS module, please see the KB article, SmarterTrack/WHMCS Addon Module .

Help for Users & Administrators

Logging into SmarterTrack

SmarterTrack's Web interface uses a modern and mobile-friendly design and is divided into two components: the management interface and the portal interface. Administrators use the management interface to set up departments and establish permissions for agents. Agents use the management interface to respond to and manage tickets, interact in chats and to access other features of SmarterTrack. Customers can use the portal interface to retrieve ticket information, submit new tickets and chats, search knowledge base articles, participate in the Community and more.

Logging into the Portal Interface

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

Agents and administrators can also navigate to the portal interface directly from the management interface. When logged into the management interface they can simply click their avatar image in the upper right corner and choose Open the Portal from the drop-down menu. The portal interface will load in another window.

Logging into the Management Interface

Agents can obtain the link to the management interface login page from their SmarterTrack administrator. However, the general URL for the SmarterTrack management interface will be something similar to your_helpdesk_URL/management/root.aspx. Therefore, if the help desk is located at https://support.example.com then the agent login will be found at https://support.example.com/management/root.aspx.

Alternatively, agents can access the management interface directly from the portal interface. Once logged into the portal, select the agent display name in the upper right corner and click Management Interface from the dropdown. Note: Agents and/or administrators that wish to access the management interface may need to re-enter their login credentials, even if they are already logged into the portal.

Logging in Using a Tablet

Agents on-the-go can access SmarterTrack from tablets by navigating to their help desk installation just as they do at their desktop computer. Both the management and portal interfaces are optimized for larger-screened mobile devices like iPads and Android tablets with support for scrolling and gestures, and easy to click buttons. Plus, SmarterTrack seamlessly integrates with other mobile apps, allowing remote employees to provide customer service, sales or support as efficiently as they do from the office computer.

SmarterTrack Mobile

For smaller screens, SmarterTools developed SmarterTrack Mobile, a mobile app that's available in both the App Store and Google Play stores. The SmarterTrack mobile app is a perfect complement to the desktop / tablet version of SmarterTrack. As it only contains management interface functionality, it allows agents and managers to reply to tickets, respond to live chats, manage tasks, and log calls wherever they are and whenever they're needed.

Agent Status -- Active Versus Available

Agents can have statuses that reflect two (2) things: their activity and their availability.

An " Active " agent is one who is able and ready to participate in tickets, live chats, take phone calls/create call logs, etc. When they're " Inactive ", then, they're essentially away for an extended period of time: they're gone for the day because their shift has ended, they're on vacation, etc. When an agent is "inactive", they don't receive any new tickets, they won't receive any ticket replies, etc. Any tickets they were working on that were in a Waiting status will be moved to an Active agent if a reply comes in, etc. (When Round Robin is being used for ticket distribution.) Any tickets they have in an active state stay with them.

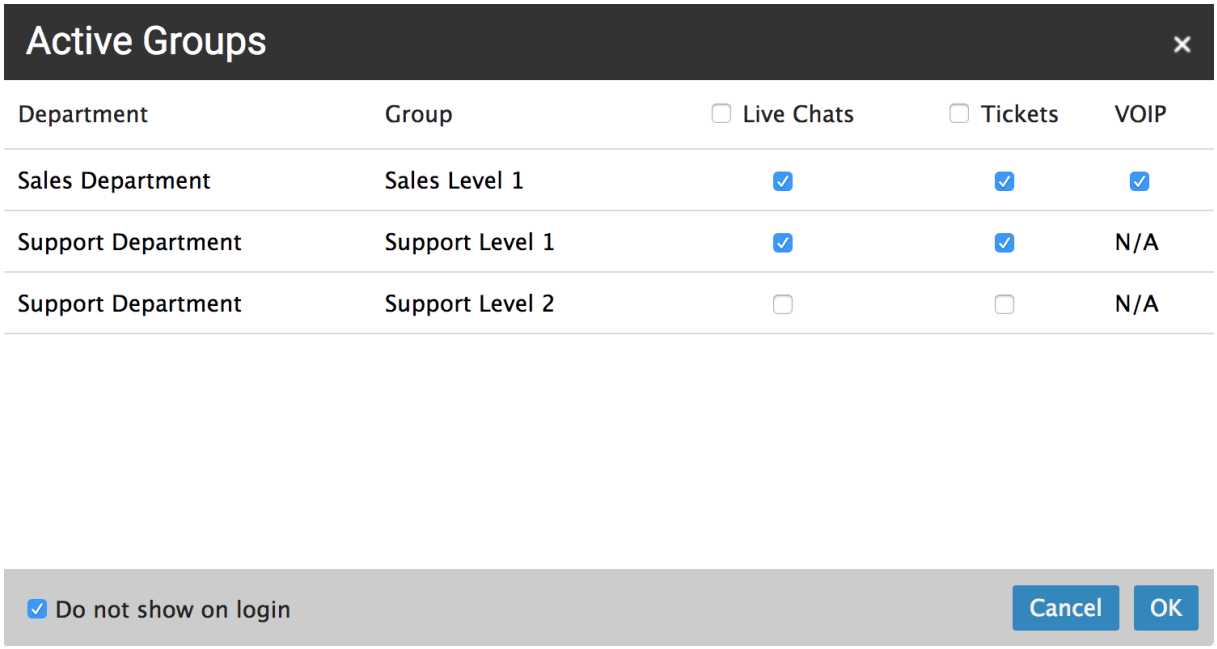
Conversely, there's the agent's "available" status: they're either Available or Unavailable . Availability generally only affects the agent's ability to participate in Live Chat: if they're unavailable they won't receive any new live chats via Round Robin, though they can pull chats from the queue. It DOES NOT affect their ability to receive new tickets. Therefore, availability can be thought of as an "Away From Keyboard" or AFK status. So if an agent goes to lunch,

takes a break, etc. and will be away for a short period of time they'll generally just mark themselves as "Unavailable" versus making themselves inactive in a group.

My Groups

Tickets, live chats, and calls from the SmarterTrack Communicator are distributed amongst a group based on the agent(s) of that group who have an Active status. In order for a ticket or live chat to be automatically assigned to an agent or for a VoIP call to make it to an agent's SmarterTrack Communicator, the agent must be logged into SmarterTrack and their Active Group status must be set to receive tickets, live chats and/or VoIP calls for the corresponding group. If all agents are either logged out or are not receiving tickets, live chats and/or calls through SmarterTrack Communicator, the ticket or live chat will be directed to the Queue and phone calls will be handled based on the ruleset created inside the phone server. For this reason, it is imperative that agents check their Active Group status upon logging in or prior to logging out and ensure they are active in the groups they are going to be working in.

The My Groups popup gives agents the ability to quickly view all of the groups they belong to and start or stop activity for live chats, tickets and VoIP calls. To help make this process simple and automatic, the Active Groups popup displays in the management interface upon login. It can also be accessed at any time by clicking on the agent avatar in the upper right corner of the interface and clicking My Groups from the dropdown.



The My Groups modal will display a list of all groups the agent is a member of. If an agent is part of a group but excluded from a particular communication method, "N/A" will appear next to the group name instead of a checkbox. The following columns will be available:

- Department - The name of the department, such as Sales, Support, or Billing.
- Group - The name of the group, such as Sales Front Line or Billing Escalation.
- Live Chats - Active Groups are used to determine the distribution method to use for live chats .
- Tickets - Active Groups are used to determine the distribution method to use for tickets .
- VOIP - Active Groups are used to determine the distribution of calls for agents using SmarterTrack Communicator. If an agent is using SmarterTrack Communicator and a VoIP account is set up and enabled for a group, this column will have a checkbox. The ruleset created inside the phone server determines the call distribution when all agents are unavailable.

Changing the Active Status of an Agent

An agent can go Active or Inactive in groups on their own, or a manager or system administrator can make an agent Active or Inactive.

As an agent, follow these steps to go Active or Inactive in a group:

- Log in to SmarterTrack using your agent credentials.
- Generally, when an agent logs in the My Groups modal will automatically display. NOTE: The My Group modal can also be accessed at any time by clicking the agent avatar image or monogram in the upper, right corner of the management interface and selecting My Groups from the dropdown.
- Find the Live Chats column. If live chats are enabled for a group, this column will have a checkbox available. Otherwise,"N/A" will be displayed. In order to start receiving chats for a particular group, check the appropriate checkbox next to the group's name. To stop receiving chats for a particular group, uncheck the appropriate live chats checkbox.
- Find the Tickets column. If tickets are enabled for a group, this column will have a checkbox available. Otherwise, "N/A" will be displayed. To start receiving tickets for a

particular group, check the appropriate checkbox next to the group's name. To stop receiving tickets for a particular group, uncheck the appropriate tickets checkbox.

• Follow these same steps for the VOIP column. (NOTE: VoIP operations require the integration of the SmarterTrack Communicator.)

• Click OK .

As a manager or system administrator, you can make an agent Active or Inactive as needed. For example, if your agents don't log out of SmarterTrack at the end of a shift, but an agent calls in sick, you can make that agent Inactive in all of their groups so that they don't receive any new tickets. To modify an agent's Active Groups, do the following:

• Log in to SmarterTrack using your manager or system administrator credentials.

• Select Active Agents from the navigation menu.

• Select By Agent from the view options in the navigation menu.

• Find the agent's name in the list. Select the agent and click the Edit button . The active groups modal opens for that agent. (Alternatively, you can double-click on the agent's name to open the active groups modal.)

• To make the agent inactive in a group, you can uncheck the boxes next to each group name for that agent in the Live Chats, Tickets and VOIP columns. Alternatively, you can simply check, then uncheck the box next to each column name to make the agent inactive in all of their groups.

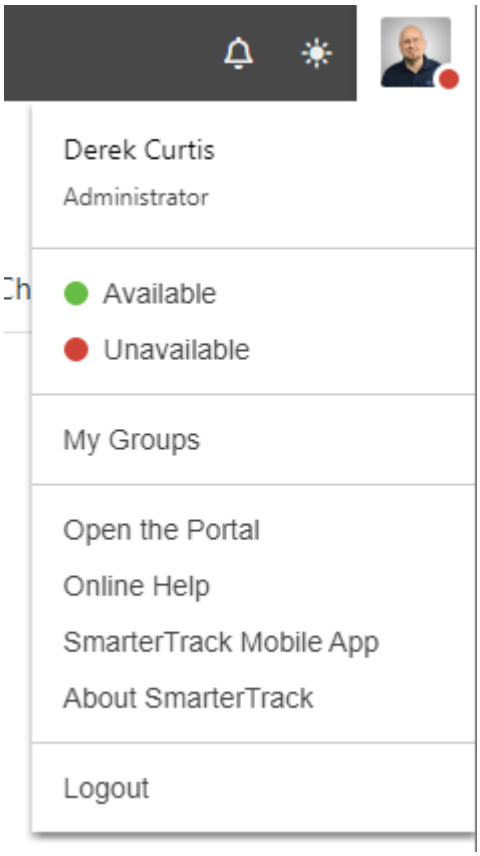
• To make an agent Active in a particular group, simply check the box next to the group name. (Again, to make an agent Active in all groups, check the box next to the column name(s).)

• Click OK .

Available/Unavailable

To temporarily stop receiving new live chats in all groups, click on your agent avatar in the upper right corner and select Unavailable . New live chats will not be assigned to you; however, you will keep possession of any existing live chats. In addition, you will still receive tickets based on the distribution method for the various groups you're part of.

To begin receiving new live chats again, select Available from the dropdown.



You'll notice Available/Unavailable is designated by a color scheme so you can tell your availability simply by looking at your avatar and checking the color of the dot that sits on top of it.

Browser Notifications

We understand that many SmarterTrack agents do not work in the management interface 100% of their day. To accommodate this, SmarterTrack utilizes browser notifications in order to alert agents of standard activity within the site. For example, when browser notifications are enabled and you are logged into the SmarterTrack management or portal interface, SmarterTrack will send a pop-up browser notification for many scenarios, including when:

- A ticket is automatically assigned to you via round-robin.
- A ticket is transferred to you by another agent.
- A live chat is in the Queue.
- A live chat is assigned to you.

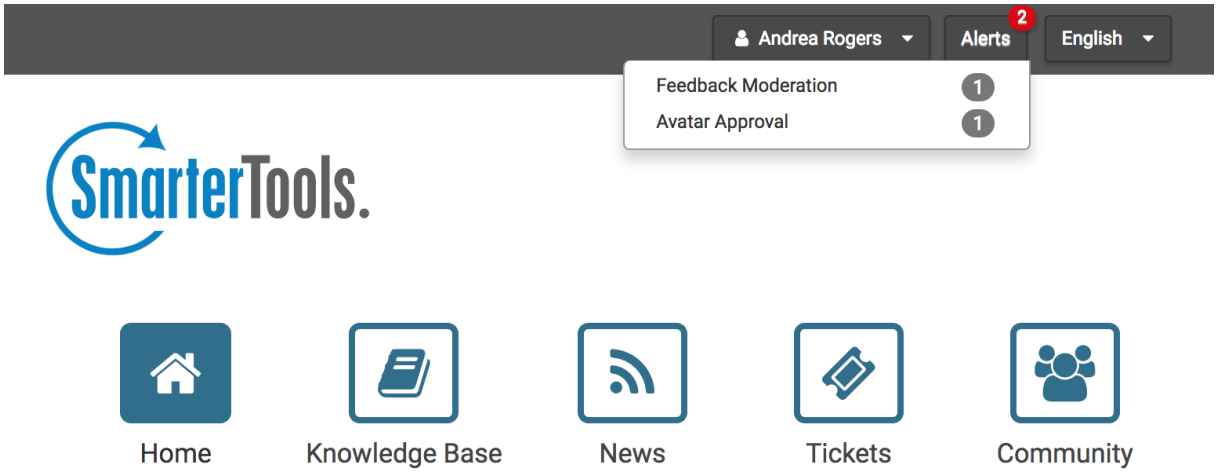
When a notification appears, simply click the browser notification and you'll open the ticket or go to the chat, regardless of the browser you're using or the application you were currently in.

Enable Browser Notifications

Browser notification permissions are managed within the browser itself. If you're using a new browser or haven't previously set the notification permissions, you will be prompted to allow this functionality when a browser notification is triggered for your account. Keep in mind that clearing your browser cookies will make SmarterTrack request this permission again. For steps on manually enabling or unblocking browser notifications, it's best to review the support documentation of your preferred browser. However, for steps on enabling browser notifications for some common browsers, you can review the knowledge base article, Unblock / Allow Browser Notifications in SmarterTrack .

Portal Alerts

When users and/or employees are logged into the SmarterTrack portal, it's possible that they will see active alert notifications. Alerts are denoted with a red number appearing on the Alerts menu in the upper right corner of the portal. These alerts serve a number of different purposes based on whether the person logged in is a user or an agent as well as the role permissions granted to the person. The various alerts are described below.



User Alerts

Users will see alerts regarding their active tickets or account settings. Alerts can be based on the role the user has and the permissions granted to that role by the SmarterTrack administrator. Users will see alerts based off of each scenario below:

- Ticket Response - Alert will display when an agent replies to a ticket and marks the ticket as waiting.
- Account Verification - Alert will display if the account email address has not been verified.
- Avatar Not Set - Alert will display if the user has not uploaded or selected an avatar.
- Conversations - Alert will display if the user has received a new Community message.

Employee Alerts

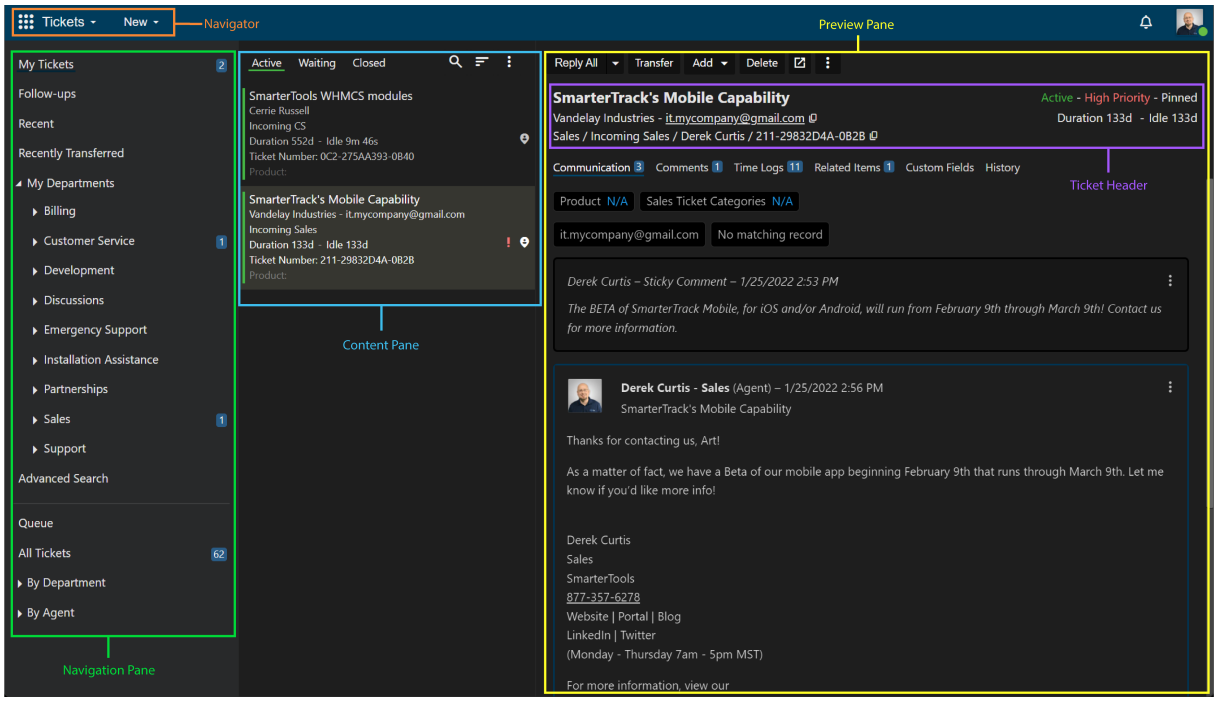
Employees will see alerts based off of the role the employee has and the permissions granted to that role by the SmarterTrack administrator. By default, administrators have full control permissions for all areas of SmarterTrack, so they will see alerts based off of each scenario below:

- Community Thread Moderation - Alerts will display when a user or an employee has reported a thread, post or comment inside the community that requires moderation. Employees will only see this type of alert if their role permissions grant them moderation privileges.
- Broken Links - Alerts will display when a knowledge base article or news item contains a link that is broken and requires attention. Employees will only see this type of alert if their role permissions grant them knowledge base privileges.
- Knowledge Base Comment - Alerts will display when a knowledge base article has a comment that requires moderation. Employees will only see this type of alert if their role permissions grant them knowledge base moderation privileges.
- Avatar Approval - Alerts will display when there are any user avatars that need approval or moderation. There are no specific role permissions for avatar approval.
- Conversations- Alert will display if the agent has received a new Community message.

Tickets

Tickets Overview

SmarterTrack's ticketing feature provides businesses with a powerful information distribution system that gives agents total control of all related communications, including emails, notes, and associated live chats and call logs. To access your tickets, log into SmarterTrack as an agent and select Tickets from the navigator. Standard agents will only see tickets that are assigned to them. Agents with the Manager role will see their own tickets plus they have the ability to view tickets for other agents in the Groups and/or Departments that they manage.



Agent Tickets vs. Global Tickets

An agent's ticket section of SmarterTrack organizes all of the tickets for which a particular agent is responsible. These tickets are assigned to the agent currently logged in and are broken down by ticket status, including Active, Waiting, and Closed ticket queues as well as views for Follow-ups, Recent tickets and Recently Transferred tickets. The total number of active, waiting and follow-up tickets are displayed alongside those statuses. The My Departments area further breaks down ticket status by each Department, and each group within the Department, the agent is part of.

The global tickets section of SmarterTrack appears beneath an Agent's ticket section and organizes all of the tickets for all departments the Agent is part of. Administrators and managers who are members of multiple groups may want to view the tickets coming into those groups to better evaluate the actual ticket needs of the organization or to gain valuable insight into company operations. To view all tickets in SmarterTrack, an agent, manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see tickets and live chats for those groups. Once this is done, they can view tickets by status, department, group or agent in the global tickets section of the navigation pane.

Understanding the Ticket List

Regardless of whether you're accessing your own tickets or global tickets, tickets in the system will load in the content pane when you click on a respective ticket section. By default, some general information about each ticket is displayed. This includes the ticket's subject, it's status, the user who submitted the ticket, its Group and its duration and idle times. It is possible to modify the "Visible Fields" that are displayed, however. To do this, simply click the Actions (...) icon (the 3 vertical dot) and select Visible Fields from the dropdown. Here, a modal window appears that allows you to add to the fields that are displayed.

In general, the following details will be displayed for each ticket in the list.

- Status Indicator - The current status of the ticket as indicated by the color shown along the left side of the ticket details: Green for Active, Yellow for Waiting, Grey for Closed and Grey for Closed and Locked.
- Subject - Similar to the subject line of an email, this is a user-generated phrase that usually describes the ticket. The subject phrase is entered by the user (customer) when the ticket is submitted. Very long subject phrases are truncated.
- User / Email Address - The username and email address of the individual that submitted the ticket.
- Group - The group that is assigned to this ticket.
- Agent - The Agent the ticket is assigned to. (Generally only seen in Global Tickets.)
- Duration - The amount of time that has passed since the ticket was submitted.
- Idle - The amount of time that has passed since a ticket action has occurred.

- Priority Indicator - If the priority level is High or Urgent, a priority icon will be displayed.
- Follow-up - If a follow-up is scheduled for the ticket, a grey follow-up icon will be displayed on the Duration/Idle line. If the follow-up on a ticket is past-due, a red follow-up icon will be displayed. Note: Tickets scheduled for follow-up will appear as Waiting.
- Pin Status - If the ticket is pinned to the assigned agent, a grey pinned icon will be displayed on the Duration/Idle line. Pinning a ticket to an agent means that agent will always be assigned the ticket, regardless of the ticket distribution method used or the agent's Active Groups . For more information on distribution methods, see Ticket Distribution Methods .

Along with the default options, other items are available to be displayed when modifying the Visible Fields. These include:

- Ticket Number - The number automatically assigned to the ticket.
- Department - The Department the ticket was assigned to.
- Status - The status of the ticket: Active, Waiting, Closed or Closed and Locked. This is in combination with the Status Indicator that appears by default.
- Priority - The ticket's priority: Low, Normal, High or Priority. This is in combination with the Priority Indicator that appears by default.

Displaying Custom Field Data

Custom fields can be also added to the content pane ticket list by clicking on the Actions (...) icon and selecting Visible Fields. Any custom field that has been assigned to a Custom Field Template can be selected to be displayed in the content pane, along with the default options.

Sorting the Ticket List

Click on the Sorting icon to modify the sorting of the tickets displayed in the content pane. Tickets can be sorted in ascending or descending order by status, priority, email address, subject, display name, brand, department, group, idle time, duration, follow-up, number of messages, agent assigned and survey results. Final sort order uses the ticket's idle time as the deciding factor. For example, 10 tickets from the same customer will sort from least idle to most idle, or vice versa.

Performing Actions on Multiple Tickets

To perform actions on multiple tickets at a time, select the tickets in the content pane and click on the Actions (...) icon at the top of the content pane. In general, the following options are available:

- Select All - Selects all of the tickets in the content pane.
- Merge - Combines the contents of multiple tickets, with the ticket properties inherited from the primary ticket. For more information on merging tickets, see Merging Tickets .
- Transfer - Transfers the selected ticket(s) to another group or agent. For more information on transferring a ticket, see Transferring Tickets .
- Status - To change the status of a ticket or to pin a ticket, select the appropriate option:

- Active - Choosing this option will mark all selected tickets as active. Generally, a ticket would be marked active when an agent is working on it.
- Waiting - Choosing this option will mark all selected tickets as waiting. Generally, a ticket is marked as waiting when the agent is waiting for a customer reply or action. tickets marked as waiting will not appear in the active tickets section and may be set to close automatically. Note: The administrator sets the length of time a ticket will remain in waiting status before it auto-closes.
- Closed - Choosing this option will mark all selected tickets as closed. Generally, a ticket is marked as closed when the agent has resolved the customer's issue.
- Closed and Locked - Choosing this option will mark all selected tickets as closed and prohibits the customer from reopening the ticket. This option is best used if a customer has a tendency of reopening existing tickets when new tickets should be created. However, it's also the best way to ensure that you're getting solid, reliable report data for SLA management. Re-opened tickets and artificially inflate metrics such as Idle Time, Total Responses, Agent Workload and more. Note: If the ticket message is bounced, the ticket will return to active status. For example, after responding to a ticket, an agent may mark the ticket as closed and locked. If that ticket response is undeliverable, the system will receive a non-delivery report and the ticket will revert to active status.

• Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option:

• Schedule - Choosing this option will assign a timeframe for which the agent will follow up on the ticket. When a ticket is ready for follow up, SmarterTrack automatically moves it to active status.
• Remove - Choosing this option will remove any follow-up assigned to a ticket. The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up.
• Priority - To change the priority level of a ticket, select the appropriate option:

• Low - The selected tickets have a low priority and will be sorted toward the bottom of the lists.
• Normal - The selected tickets have a normal or unspecified priority level.
• High - The selected tickets are a high priority and will be sorted toward the top of the lists.
• Urgent - The selected tickets are very important and will show at the top of the lists.
• Pin - To pin or unpin the selected ticket(s), select the appropriate option. Note: Tickets cannot be pinned unless they are in an active group. Therefore, tickets in the queue cannot be pinned to an agent.

• Pin Ticket - Choosing this option will ensure that the ticket will not be assigned to another agent. A pinned ticket will remain assigned to you even if you log out and hand-off your tickets. If a ticket is pinned, all correspondence relating to the ticket will be assigned to you, regardless of your status. Note: If the administrator enables automatic ticket rebalancing, pinned tickets may be reassigned.
• Unpin Ticket - Choosing this option will allow the ticket to be assigned to another agent.
• Get From Queue - If the tickets selected are part of the Queue, this allows an agent to take them so they can be worked on by that agent.
• Delete - Click this button to delete the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .

Ticket Distribution Methods

How new tickets are distributed to agents is set up when agents are added to a Group . Behind the scenes, there are two ways new tickets can be distributed to agents: They can pull tickets from the queue, meaning agents decide which tickets to take, or tickets can be assigned to agents automatically via a "round-robin" distribution method.

For more details on setting up the SmarterTrack distribution methods, refer to the KB article Ticket and Live Chat Distribution Settings .

Pull from Queue

Also known as "cherry-picking", this distribution method allows agents to pick and choose the tickets they want to work on. If all agents in a group are set to Pull from Queue, all tickets are directed to the Queue and agents must manually take the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. It can also be used by companies that want the absolute fastest response time and are not concerned that agents can see all available tickets. Because this relies on the agents to do their fair share (and not pick the easy tickets), proper agent training is essential for successful implementation of the cherry-picking distribution method.

Administrators that choose this distribution method should note the following:

- When agents are added to a group, in order for them to cherry-pick tickets, the agent's Ticket Handling option should be "Pull from Queue". This will add the agent to the group so that they can see tickets, take transfers and pull tickets from the group's queue; they just won't receive any new tickets automatically.
- New tickets are not assigned directly to agents. All tickets are directed to the Queue and are grabbed by staff members. (Waiting and follow-up tickets are assigned as usual, if the agents are active in the proper ticket groups.)
- It's recommended that managers or system administrators configure event notifications that alert agents and/or managers when tickets have been waiting in the Queue too long.

Round Robin

If administrators want to have more control over how tickets are distributed and to whom, using a round-robin distribution method by enabling assignment groups is the answer. For example, a company that has a sales team that works on commission may employ the basic round-robin distribution method to ensure that all sales agents receive the same number of potential leads. Another example is a technical support group that consists of both veteran agents as well as new or "in training" agents. In this case, administrators would want to make sure the more senior agents receive more tickets than the newer agents. In this case, when the group is set up and the agents are added, the more senior agents receive a high "max tickets" setting and are put in the primary round-robin group, whereas newer agents are given a lower ticket limit and are added to the secondary group. In that way, the senior agents get all new tickets first, with the newer agents acting as the overflow.

Administrators that choose this distribution method should note the following:

- In order for the round-robin distribution method to be used, at least one agent needs to have an assignment group, either primary or secondary.
- An agent is considered in receipt of a new ticket in the following cases. In each case, the ticket is counted against any Max Ticket settings for the agent:

- An active ticket is created as an incoming or outgoing ticket and assigned directly or indirectly to him.
- A ticket is transferred from a different user to him, and it's active.
- A new ticket is created through email or web services and is assigned to the agent.
- An existing ticket is replied to through email and it is assigned to the agent but it was assigned to someone different before.
- A ticket is created through web services and is set as active.
- Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to reset back to the count of open and active tickets for each agent. This prevents people that are on vacation from getting 20 tickets when their day starts, but still allows the system to deal with agents that come in a few minutes late.

• When adding agents to a group, it IS possible to exclude specific agents from the round-robin distribution. For example, managers may want to be part of a group but not receive any tickets. In this case, simply set the Ticket Handling for the agent to "Pull from Queue" when the agent is added to the group, or edit the agent as needed.
• It IS possible for agents in the secondary round-robin group to be the first to receive tickets. This will occur if agents in the secondary group log in before agents in the primary group. For this reason, it's advisable that primary group agents log in first OR that agents in the secondary group have a managed ticket load using max ticket settings.

A Note on Round Robin, Agent Workload and Assignment Groups

When adding agents to a group, it's possible to set the number of max new tickets that the agent can have open at any one time in addition to the assignment group that the agent belongs to. If you set Max Tickets for all agents, regardless of their assignment group, once the max tickets limit for all agents is reached, any tickets that come into the group will go into the Queue and not distribute completely. The queue will only distribute as fast as the agents work. If it is important for the queue to be empty, you will want to avoid setting a Max Tickets limit for agents and NOT let them go inactive, again, regardless of their assignment group. Removing max ticket limits will provide the most balanced distribution across a 24-hour period. The Max Tickets setting represents how many NEW tickets are distributed and sitting in the agent's active list. That means that while follow-ups and waiting tickets that become active for an agent (e.g., a reply to a waiting ticket comes in) do not follow max ticket limit, they DO affect agents receiving new tickets. This is important because it allows new work to be evenly distributed but continues to let agents to manage their existing workload.

On the other hand, for new employees, agents-in-training or in circumstances where agents log out at the end of a shift or the end of the day, it may be worthwhile to add a max tickets limit while allowing all other agents in the group to grab the remaining workload.

Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on rules set by the administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

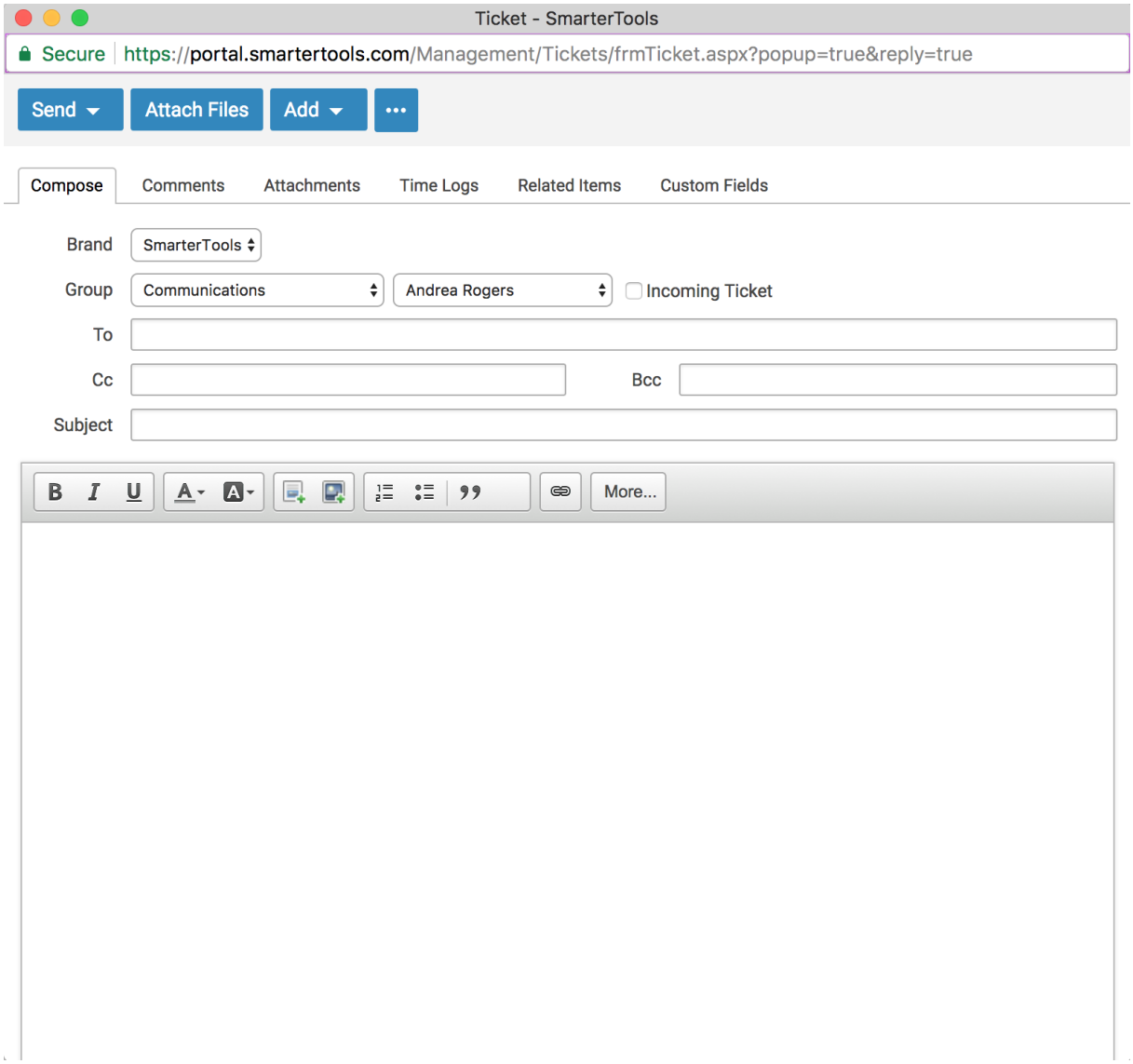
Administrators that choose this distribution method should note the following:

- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see the Rebalance Rules section of Tickets .

Creating New Inbound or Outbound Tickets

Agents can create both inbound and outbound tickets within the management interface. For example, if a customer calls on the phone and requests more information about a product or service, the agent can send the information in an outbound ticket that's emailed to the customer. On the other hand, an agent may need to create an incoming ticket on behalf of the customer. For example, if a customer calls in and needs to submit an issue to a specific department, the agent can create a new ticket, mark it as incoming, and fill in the message as if it were the customer sending in the request. The department's autoresponder would be sent to the customer's address (if an autoresponder is configured), and the agents in that department can work with the customer to provide a resolution to the issue.

To create a new ticket, log in the management interface and click the New button in the Navigator then select Ticket from the dropdown. A new ticket window will open that the agent will use to compose an email to the customer or to the ticketing system.



Composing a Ticket Message

The ticket compose window is where the agent will fill out various pieces of information for the routing of the ticket, as well as other details and the ticket message/content. Along with the Compose tab, which is used to compose the ticket message, various tabs will appear based on the ticket template used, and any information that's added to the ticket prior to it being submitted. For example, when adding things like Comments, Attachments, Time Logs, Related Items and Custom Fields, their respective tabs will appear at the top of the ticket compose window.

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

- Brand - The primary brand the ticket should be created for. NOTE: If only one brand is configured in SmarterTrack, this selection will not appear.
- Group - The Group to assign the ticket to. While a Group is required, it is possible for the ticket to be auto-assigned to an agent using whatever distribution method is in place for the Group.
- Agent - The Agent who will be assigned the ticket within that Group.
- Incoming Ticket - Select this option to create an incoming ticket. For Incoming tickets, the To and From fields are essentially reversed so that the ticket appears to be originated from the customer rather than from the support agent. Incoming tickets will send the department autoresponder to the email address entered in the From field, if enabled.
- To - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should autofill this field. If the ticket will be sent to multiple people, separate email addresses with a semicolon.
- Cc - The email address of any individuals that should receive a copy of the ticket response. If the ticket will be copied to multiple people, separate email addresses with a semicolon.
- Bcc - The email address of any individuals that should receive a blind carbon copy of the ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semicolon.
- Subject - The subject of the message. If the agent is replying to a ticket, SmarterTrack should autofill this field.

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

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

- Send - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; or Send and Schedule Follow-up. For more information about the different options, see Tickets Overview .
- Attach Files - Adds an attachment to the ticket response that goes to the customer.
- Add - Adds a comment, resolution, task, time log, call log or other related item to the

ticket. For more information about the different options, see Viewing Tickets .

• Actions (...) - Click this button and select the appropriate option:

• Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .

• Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.

• Insert Form - Allows the agent to choose from a list of forms. To choose a form, simply double-click it and it will be automatically inserted at the beginning of the ticket response.

• Pin - To change the pin status of a ticket, select the appropriate option. For more information about the different options, see Tickets Overview .

Viewing Tickets

Viewing tickets is simple: once you log in to SmarterTrack, select Tickets from the navigator. SmarterTrack defaults to the agent's Active tickets tab in the content pane. (I.e., My Tickets -> Active.) To change the list of tickets that are displayed, an agent simply selects a different tab to view: Active, Waiting, or Closed. These tabs are the same regardless of where you navigate to in the navigation pane -- My Tickets, Recent, tickets for the various departments the agent is part of, the Queue, as well as for managers viewing All Tickets, tickets by department, or tickets by Agent.

To view the contents of a ticket, simply click the desired ticket and it will load in the preview pane. If you would rather view the ticket in a pop-up window, double-click the ticket in the content pane. (You can also click the pop-out icon from the toolbar on the ticket itself.)

In general, the following options are available from the preview pane toolbar when viewing a ticket, or on the ticket itself when it's popped-out:

• Take - This option is only available if an agent is a part of a ticket group but does not have possession of the ticket. It allows an agent to "take" ownership of a ticket from another agent (or from the Queue) and make it an active issue in their own queue.

• Reply - If the agent owns the ticket, this allows them to compose a reply to the ticket.

For more information on replying to a ticket, see Replying to Tickets . A side note, SmarterTrack allows administrators to set a "Default Reply Option" for tickets -- to either Reply or Reply All. This setting dictates whether this button will display as Reply or Reply All for agents. By default, this is set to "Reply", so that is what most agents will see.

• Reply All - If the agent own the tickets, this allows them to compose a reply to all of the emails listed in the To field of the ticket.

• Transfer - Transfers the ticket to another group or agent. For more information on transferring a ticket, see Transferring Tickets .

• Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the ticket.

• Comment - Adds a comment to the ticket. Agents can select the type of comment they want to add: General, Resolution, Transfer, Follow-Up, or Sticky. Comments will appear within the timeline of the ticket -- that is, they'll appear between ticket responses based on when the comment was made. The exception are Sticky comments, which are always displayed at the top of the ticket response timeline. Ticket comments are only visible to agents and managers.

• Resolution - (NOTE: This is the same as adding a "Resolution" comment to a ticket.) When an agent adds a Resolution to a ticket, this information is stored in a searchable database that can be used to quickly and efficiently resolve tickets that detail issues similar to the ticket receiving the Resolution. Tickets with resolutions appear when an agent selects Resolved Tickets option from the ticket's Actions menu. (See below.)

• Internal Attachment - Attaches a file to the ticket that is only available to the agents who work on the ticket. When an agent adds an internal attachment to a ticket, this information is stored in the Attachments and Communication tabs of the ticket.

• Related Item - Adds an existing ticket, call log or live chat to the ticket. When an agent adds a related item to a ticket, this information is stored in the Related Items tab.

• New Task - Allows the agent to create a new task then attaches that task to the ticket. When an agent adds a task to a ticket, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.

• New Time Log - Allows the agent to create a new time log then attaches that time log

to the ticket. When an agent adds a time log to a ticket, this information is stored in the Time Logs tab.

• New Call Log - Allows the agent to create a new call log then attaches that call log to the ticket. When an agent adds a call log to a ticket, this information is stored in the Related Items tab and appears in the Call Logs section of the management interface.

• Delete - Deletes the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .

• Pop-out - Allows the agent to open the ticket in a pop-out window.

• Actions (...) - Click this button and select the appropriate option to mark the ticket for follow-up, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• Status - To change the status of a ticket or to pin a ticket, select the appropriate option. For information on the different status types, see Tickets Overview .

• Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option. For more information on follow-ups, see Scheduling Tickets for Follow-up .

• Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .

• Pin - To pin or unpin the ticket, select the appropriate option.

• Send Form - Allows the Agent to send a Form to the ticket originator.

• Change Email Address - Select this option to change the email address associated with the ticket. Agents can change the email address to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the email address associated with a ticket is changed using this control (rather than editing the To field on replies), the new email address will be automatically included for all future replies to the user. The user may adjust the subject on their reply, however, this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.

• Change Subject - Select this option to change the subject of the ticket. Agents can change the subject to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the subject of a ticket is changed using this control (rather than editing the subject on reply), the new subject will be used for all future replies to the user. The user may still adjust the subject on their reply, however,

this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.

• Print - Prints the information contained in the communication, custom fields, and details tabs of the ticket. Note: If viewing the management interface from a mobile device, this option may not be available.

• Assistance - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.

• Knowledge Base Articles - Displays a list of knowledge base articles that may be related to the selected ticket. Agents can use search terms to find the knowledge base article that best relates to the ticket.

• Resolved Tickets - Displays a list of resolutions that may be related to the selected ticket. Agents can use search terms to find the resolution that best relates to the ticket.

• Manual Events - At the bottom of the Actions are listed any manual events an agent has created that can be performed against the selected ticket. For more information, see the Events Overview page of the online help.

Tabs within the Ticket

Ticket information is organized within the following tabs. (NOTE: A tab is only displayed for a ticket if there is an item associated with that tab. For example, if there are no attachments for a ticket, the Attachments tab is not displayed.)

• Communication - This tab includes all correspondence and comments pertaining to the ticket, with the most recent communications listed first. Agents collapse or expand correspondence using the icons on the top right corner of each communication. Note: By default, only the 15 most recent items will display when an agent views the ticket. To see all communication items, click the button to view additional items at the bottom of the ticket.

• Comments - This tab displays any comments agents would like to note about the ticket or customer. Comments are only visible to agents.

• Attachments - This tab lists any files that were uploaded to the ticket by an agent or customer.

• Forms This tab displays any Forms that were sent to the ticket originator. Agents can

then view the information contained with in the completed Forms by opening them.

• Time Logs - This tab lists any time logs attached to the ticket.

• Related Items - This tab lists any tickets, live chats, call logs, time logs, tasks or files attached to the ticket.

• Custom Fields - This tab includes any custom fields the administrator created to help customize your company's tickets. This information can be populated by a user, an agent, or a third-party application (via the administrator).

• History - This tab summarizes any actions associated to the ticket.

Individual Ticket Message Options

At the right side of each message within a ticket is another Action icon. Clicking on that reveals different options, depending on whether viewing an agent response or a user response. Generally, these are:

• Show HTML - For incoming OR outgoing messages, allows you to view the pure HTML of the message. While the Preview Pane will only display information that is generated from within SmarterTrack, and standard-format HTML messages that are sent to SmarterTrack, the Show HTML option will display non-standard HTML encoding. For example, emails that are generated from a third-party product, like a billing application, but that have a reply-to address that sends the email into SmarterTrack. While the billing application email may not display in the preview pane, it WILL display when you select the Show HTML option.

• Raw Content - Shows the complete details of the ticket in text format, including all header information. Note: Raw contents for tickets are compressed after 1 day of inactivity to reduce disk space and reduce the number of files on the server.

• Translate - When viewing a user response in a foreign language, this allows the agent to translate the text, based on the methods set up by the system administrator for translation.

• Create Ticket - When viewing a user response, this allows an agent to create a new ticket that is based on the response being reviewed. This allows agents to separate different issues into different tickets, thereby keeping issues separate and worked on individually, ensuring issues are not lost.

• Reply With Copy - This allows an agent to copy the text of a previous reply and

include it in a new reply back to the customer. For example, if steps were laid out for a user, but they were missed, the agent can simply reply back to the user and re-use that previous reply, keeping them from having to re-type what could be a lengthy explanation.

• Quote Email - For incoming messages only, allows you to quote a specific message within a ticket thread to send in a new outgoing message.

• Resend - For outgoing messages, allows agents to resend the message.

• Forward - For incoming OR outgoing messages, allows you to forward the message contents, including attachments, in a new outgoing message.

Viewing the Ticket Header

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

A ticket's header is laid out as follows:

• Line 1 : Ticket Subject - Status - Priority and Pin status

• Line 2 : User (User's Email Address) - Duration and Idle Time

• Line 3 : Department Assigned/Group Assigned/Agent Assigned/Ticket Number

• Surveys - If a survey has been completed for the ticket, a star rating indicator will appear on the ticket header. Agents can double-click on the rating to bring it up in a new window.

Regarding the User Email Address, in many instances you'll notice the user's email address is underlined. When you click on an email address with an underline, the user details will load in a pop-up window:

• User Details - User Details display a variety of data about the user. For example, the user's role in SmarterTrack, a list of any tickets started from that email address, any live chats started from that email address, any call from a user with that email address and if any custom fields are associated with the user, those are displayed as well. Also available are tabs for ticket history and customer statistics, which includes information on the number of tickets, live chats, calls and time logs over specific periods of times.

Custom fields can be associated with any user, and, if present, any agent or manager can view them by selecting "User Details" from the email address mouseover.

Viewing Tickets in the Queue

On occasion, tickets are directed to the queue instead of directly to an agent. Generally, this happens because all agents for a group are either logged out or are not receiving tickets, the ticket limit for an agent (or for all agents) has been reached, or the ticket distribution method for agents is set to Pull From Queue. Regardless of the reason, if agents can not receive tickets then they will go directly to the ticket queue. To view tickets in the queue, simply click Queue in the navigation pane. By default, the Active tab is displayed. To change this, select the desired status tab.

Viewing Recent Tickets

To view tickets by recent activity, select Tickets from the navigator. Within an agent's tickets area there are two sections for recent tickets: Recent and Recently Transferred. These sections allow agents to more easily locate tickets. The Recent view will show the 100 most recent tickets that an agent has touched or modified, regardless of ticket status. (I.e., Active, Waiting, or Closed.) "Touched" or "modified" includes tickets that have been responded to, had comments added, the ticket status changed, etc. The Recently Transferred view will show the 100 most recent tickets that have been transferred from an agent's queue, regardless of whether the agent transferred the ticket out or if an agent has taken the ticket. Tickets within these two sections are sorted by most recent activity, with the most recent shown at the top.

Viewing Tickets by Brand

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

Viewing Tickets By Agent

To view tickets by agent, select Tickets from the navigator, expand By Agents and click the appropriate agent in the navigation pane. All active tickets for the selected agent will load in the content pane, by default. Note: The ability to view tickets by agent is only available to managers using installations with less than 500 agents. In addition, managers can only view tickets for the groups/departments in which they belong.

Viewing Deleted Tickets

To view deleted tickets, using Advanced Search is the best option. Simply click Advanced Search from the navigation pane, and change the "Items to Include" to "Only deleted items". The only other thing that could be changed would be the Date Range for the search. SmarterTrack will default to January 1, 2000, so if a more granular search is required, then the start and end dates would need to be adjusted.

Of course, other fields can be modified: the agent who deleted the ticket, the department/group the ticket belonged to, etc. All of these fields can be modified as needed -- the most important thing when searching for deleted tickets is that the "Items to Include" is changed to "Only deleted item". This ensures ONLY deleted tickets are displayed in the results of the search.

Replying to Tickets

To respond to a ticket, simply click the Reply (or Reply All) button in the preview pane toolbar. This will open a ticket response window that can be used to compose an email response to the user(s). Choosing Reply All allows you to reply to ALL recipients of the ticket who are listed in the To, Cc and Bcc fields, while choosing Reply will reply to only the sender. (Administrators can choose the Default Reply Option - Reply or Reply All - in the Tickets settings .)

When replying to a ticket, SmarterTrack automatically fills in the To: field with the email address(es) of the recipient(s) from the last ticket message and the subject field with the subject from the original ticket message. The Compose window gives agents the space, and the tools, to be able to adequately respond to the customer. Previous replies are excluded, but can easily be seen in the preview pane of the primary SmarterTrack interface. Note: When

a ticket is submitted to SmarterTrack, a ticket number is automatically generated for the correspondence, and that ticket number is appended to the front of the original message's subject line. This ticket number should not be modified, moved or removed as SmarterTrack uses that number for its indexing and identification processes.

Composing a Ticket Response

The ticket response window contains, essentially, the same ticket information (details, custom fields, related items, history, etc.) you see in the preview pane. The exception is that it also offers the compose tab, which the agent will use to compose the ticket response.

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

- To - The email address(es) for the message recipient(s). If the agent is replying to a ticket, SmarterTrack will autofill this field. If the To: field contains a single email address, but the sender has requested that others receive the reply, additional addresses can be added, just separated with a semicolon. (E.g., jon@@example.com; alex@@example.com; beth@@example.com)
- Cc - The email address(es) of any individual(s) that will receive a copy of the ticket response. Generally, this is pre-filled when "Reply All" is used. If others need to be added, additional addresses can be added, just separated with a semicolon.
- Bcc - The email address(es) of any individual(s) that should receive a blind carbon copy of the ticket response. Again, this is pre-filled when "Reply All" is used. If others need to be added, additional addresses can be added, just separated with a semicolon.
- Subject - The subject of the message. If the agent is replying to a ticket, SmarterTrack will autofill this field. NOTE: If the Subject of the email reply needs to be changed, it should be done using the Change Subject option in the Actions menu. This ensures the ticket number stays intact and is not altered in any way.

The text of the ticket response can be added in the large editing box below the ticket header. Agents can change the formatting, like bold words, add in bulleted or number lists, add images, etc. this can be done using the HTML editing tools available.

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

• Send - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; Send and Schedule Follow-up; or Send and Transfer.

• Send and Mark Active - This sends the response, but will leave the ticket in the agent's Active queue. Generally, this is used for a quick response to a customer, like letting them know the ticket is in the hands of the agent and being actively worked on.
• Send and Mark Waiting - This sends the response to the customer, and moves the ticket to a Waiting status. Waiting tickets are generally those where a reply was sent, but follow-up from the customer is necessary. For example, when an agent asks for additional information on an issue, asks for confirmation that an issue is resolved, etc. Ideally, Waiting tickets are expected to receive a relatively quick reply from the customer.
• Send and Mark Closed - This sends the response and then closes the ticket. Tickets that are marked as "Closed" are considered resolved, but the customer can reply to the ticket and re-open it, which means it will become part of the agent's Active queue. Though closed tickets are considered "resolved", this doesn't bar the customer from replying with additional questions, with questions unrelated to the ticket itself, etc.
• Send and Mark Closed and Locked - This sends the response, closes the ticket, and locks it. Locked tickets cannot be replied to by the customer. This is the ideal method for resolving tickets as it prevents customers from re-opening tickets with unrelated questions or issues.
• Send and Schedule Follow-up - This sends the response, puts the ticket in a Waiting status, but allows the agent to schedule a follow-up for some time later -- later that same day, a few days later, etc. Follow-ups allow the agent to finalize a ticket and ensure that any resolution sent actually worked for the customer. At the date/time of the follow-up, the ticket is automatically moved from a Waiting to an Active status for the agent.
• Send and Transfer - This sends the response, but allows the agent to transfer the ticket to another agent. This is best used when an agent has some scheduled time away -- either PTO or temporary assignment to another department. In these cases, transferring the ticket to another agent after a response is sent ensures that any follow-up necessary is handled by someone, and that any replies aren't sent back to the agent

while they're away or on temporary assignment.

• Save Draft - Saves a draft of the ticket response. SmarterTrack will automatically save drafts of ticket responses, but agents can opt to save a draft of a completed response for any reason, such as pending additional information or review by a supervisor. Note: There can be only one draft per ticket. If there is a draft response for a ticket already, and another draft is created for the same ticket response, the original draft will be overwritten.

• Attach Files - Adds an attachment that is included with any response to the ticket. This is a good way to send instructional documents, screenshots, white papers or other files to customers and end users. In order to attach files, you will need to specify the file types allowed. More information can be found on the Security help page. (NOTE: By default, the maximum file size allowed for any attachment is 2MB.)

• Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the ticket.

• Comment - Adds a comment to the ticket. Agents can select the type of comment they want to add: General, Resolution, Transfer, Follow-Up, or Sticky. Comments will appear within the timeline of the ticket -- that is, they'll appear between ticket responses based on when the comment was made. The exception are Sticky comments, which are always displayed at the top of the ticket response timeline. Ticket comments are only visible to agents and managers.

• Resolution - (NOTE: This is the same as adding a "Resolution" comment to a ticket.) When an agent adds a Resolution to a ticket, this information is stored in a searchable database that can be used to quickly and efficiently resolve tickets that detail issues similar to the ticket receiving the Resolution. Tickets with resolutions appear when an agent selects Resolved Tickets option from the ticket's Actions menu. (See below.)

• Internal Attachment - Attaches a file to the ticket that is only available to the agents who work on the ticket. When an agent adds an internal attachment to a ticket, this information is stored in the Attachments and Communication tabs of the ticket.

• Related Item - Adds an existing ticket, call log or live chat to the ticket. When an agent adds a related item to a ticket, this information is stored in the Related Items tab.

• New Task - Allows the agent to create a new task then attaches that task to the ticket.

When an agent adds a task to a ticket, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.

• New Time Log - Allows the agent to create a new time log then attaches that time log to the ticket. When an agent adds a time log to a ticket, this information is stored in the Time Logs tab.

• New Call Log - Allows the agent to create a new call log then attaches that call log to the ticket. When an agent adds a call log to a ticket, this information is stored in the Related Items tab and appears in the Call Logs section of the management interface.

• Actions (...) - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see Tickets Overview .

• Pin - To pin or unpin the ticket, select the appropriate option.

• Insert Canned Reply - Allows the Agent to select text from a Canned Reply that will be inserted into their reply.

• Insert Form - Allows the Agent to send a Form to the ticket originator.

• Change Email Address - Select this option to change the email address associated with the ticket. Agents can change the email address to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the email address associated with a ticket is changed using this control (rather than editing the To field on replies), the new email address will be automatically included for all future replies to the user. The user may adjust the subject on their reply, however, this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.

• Change Subject - Select this option to change the subject of the ticket. Agents can change the subject to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the subject of a ticket is changed using this control (rather than editing the subject on reply), the new subject will be used for all future replies to the user. The user may still adjust the subject on their reply, however, this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.

• Assistance - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.

• Knowledge Base Articles - Displays a list of knowledge base articles that may be related to the selected ticket. Agents can use search terms to find the knowledge base article that best relates to the ticket.
• Resolved Tickets - Displays a list of resolutions that may be related to the selected ticket. Agents can use search terms to find the resolution that best relates to the ticket.
• Manual Events - At the bottom of the Actions are listed any manual events an agent has created that can be performed against the selected ticket. For more information, see the Events Overview page of the online help. If no Manual Events are configured, this option will simply state "No manual events available".

Scheduling Tickets For Follow-up

One method for managing tickets in SmarterTrack is by scheduling them for follow-up. In fact, use of follow-ups versus simply replying to tickets and marking them as Waiting once a response is sent is a better way for agents to manage their responses. If a ticket is simply replied to, and marked as Waiting, those tickets can linger for prolonged periods (days, or even weeks) unless the agent actively manages their Waiting items. Using a follow-up, that management is automated for the agent. Businesses can set up their own customer service rules for follow-ups, such as a ticket should receive 3 follow-up replies (e.g., one every other day) before it can be closed and locked. This ensures that customers receive replies from the business on a set schedule, plus it makes customer service metrics much easier to track, thereby making these metrics easier to report, and take action, on. When a ticket is scheduled for follow-up its status changes to "waiting." It then automatically becomes "active" on the day and time the agent has scheduled for the follow-up.

To schedule a ticket for follow-up from the content pane, select the desired ticket. Then click the Actions (...) menu in the content pane toolbar, select Follow-up and click Schedule . The follow-up options will load in a popup window.

Agents can also schedule a follow-up when replying to tickets. They simply need to utilize the "Send and Schedule Follow-up" option when sending the reply. When they do, the follow-up options window will open and they will have to set the day/time for the follow-up before the

reply is sent. Regardless of how the follow-up is scheduled, the following options are available:

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

Follow-ups and Agent Status

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

Finding Tickets Scheduled for Follow-up

When an agent schedules a ticket for follow-up, SmarterTrack automatically assigns a waiting status to the ticket. To view all tickets scheduled for follow-up, select the Waiting tab in the content pane. Waiting tickets scheduled for follow up will display a grey follow-up icon. (It looks like a clock, or a timer.) It's possible to sort tickets by follow-up status as well using the Sort menu. Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status and the follow-up icon will turn red. These tickets area also placed in the Follow-ups status in the Navigation Pane.

Removing a Follow-up from Tickets

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

Merging Tickets

On occasion, an agent may need to combine multiple tickets into one. Merging tickets may be beneficial in a number of scenarios:

- An end user removed the ticket number from the subject of their email response, causing the reply to create a new ticket rather than append the current ticket
- An end user submits multiple, very similar tickets at once
- An end user submits the same ticket to multiple departments

To merge tickets, you'll need to get each ticket displayed together in one window. This can be done by doing an advanced ticket search or by opening the User Details window for the user. To merge tickets from advanced search results, perform a search then select the tickets that should be merged. Click the Actions menu in the content pane toolbar and click Merge. To merge tickets in the User Details window, open the User Details window by clicking on a header email address, then checkmark the tickets that should be merged and click Merge. Then, select the ticket which should become the primary ticket and have its ticket properties inherited. The primary ticket is the one that will remain after the merging is complete. All

other selected tickets will have their data moved into the primary ticket, with the behaviors listed below. MERGING TICKETS IS PERMANENT AND CANNOT BE UNDONE. Up to 10 tickets can be merged at once.

Merged tickets will have the following characteristics:

- Ticket properties, such as status, follow-ups, assigned agent, etc., all follow the primary ticket.
- Custom Fields all follow the primary ticket.
- Ticket communication items, such as replies, comments, attachments, and history, will be merged for the tickets into one communications stream.
- Reports will no longer reference the old ticket(s), which means that timing reports may show less data than they did before the merge.
- Surveys will be merged, so the merged ticket(s) may contain more than one survey result.
- When you merge tickets from multiple users, all users will be able to see full contents of the merged ticket. This is important to know, just in case some replies contain information that other recipients should not see.
- A forwarder is recorded, so if the customer replies back using the old ticket number, the email will be correctly recorded in the primary ticket instead.

Merging tickets works best for tickets without a lot of history to them. If you merge multiple tickets that have a lot of transfers, replies, escalations or communication items, it may be more complicated to follow the conversation or history tab when reading the new merged ticket. For items with a lot of history, use Related Items instead. Note: Though similar in nature, merging tickets is different than using the Related Items function, as merging tickets combines the data and discards the leftover tickets. Related Items, on the other hand, simply acts as pointers to other tickets, live chats or call logs that may be similar in nature or related to each other.

Transferring Tickets

On occasion, an agent may need to transfer a ticket to another agent or group. There are various reasons why a ticket may be transferred. For example, a level 1 tech support agent may need to escalate the ticket to a more experienced level 2 agent for resolution or a sales

ticket should actually be handled by the support department. Note: The ability to transfer tickets is determined by the role permissions. By default, any agent can transfer tickets, so a manager would need to change role permissions to exclude an agent, or group, from the ability to transfer. For more information, see Roles .

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

- Instance - Select the SmarterTrack installation from the list. Note: This field is only available if there are multiple installations of SmarterTrack available and the administrator has enabled cross-installation ticket transferring in Connected Services .
- New Brand - The brand the ticket should be transferred to. Note: This will only appear if there are multiple brands set up in SmarterTrack.
- New Group - If the ticket should be transferred to a new group, select it from this dropdown list.
- New Agent - Select the new agent who will be taking the ticket. If the ticket does not need to transfer to a specific agent, choose the auto-assign option and the ticket will be assigned to an agent within the specified group based on the distribution method set by the administrator.
- New Priority - If the ticket's priority needs to change, select it from the dropdown. Generally, an agent will not need to change the ticket priority.
- New Status - If the ticket's status needs to change, select it from the dropdown. Generally, an agent will want to mark a transferred ticket as Active.
- Pin Ticket - Check this box to pin the ticket to the agent receiving the ticket.
- Transfer Comment - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the ticket was transferred.

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

Tickets in Queue

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

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

For information about how SmarterTrack assigns tickets from the queue, see Ticket Distribution Methods .

Deleting Tickets

The ability to delete a ticket is determined by role permissions. By default, agents cannot delete tickets, so a manager would need to change role permissions to grant an agent, or group, the ability to delete. For more information, see Roles .

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

using Advanced Search. Any deleted tickets that have not yet been purged are marked in the database with a status of "Closed and Locked”.

Searching Tickets

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

Basic Search

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

Advanced Search

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

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

General Criteria

The following fields are available:

- Ticket Number - To search by ticket number, enter the ticket number in this field.
- Search String - Type the specific keywords to be queried. The body, subject, and notes sections of tickets will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Items to Include - This dropdown allows you to select either all ticket items EXCEPT

deleted items or to only search in deleted items.

• Departments/Groups - This dropdown is organized by department and group. To search in all groups in a department, select the department name from the dropdown. To search in an individual group, select that group.

• Agent - To search by agent, select the appropriate agent from the list.

• Status - To search by ticket status, select the appropriate status from the list.

• Priority - To search by priority level, select the appropriate priority level from the list.

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

Note: To make searching faster, limit the date range to search as much as possible. In addition, searching "Everywhere" can significantly impact how quickly results will be returned.

Custom Fields

The administrator can create an unlimited number of custom fields to help further categorize tickets. As a result, these fields can be combined with the General Criteria and used to further refine the search criteria. For help with custom fields, consult your administrator.

Live Chat

Live Chat Overview

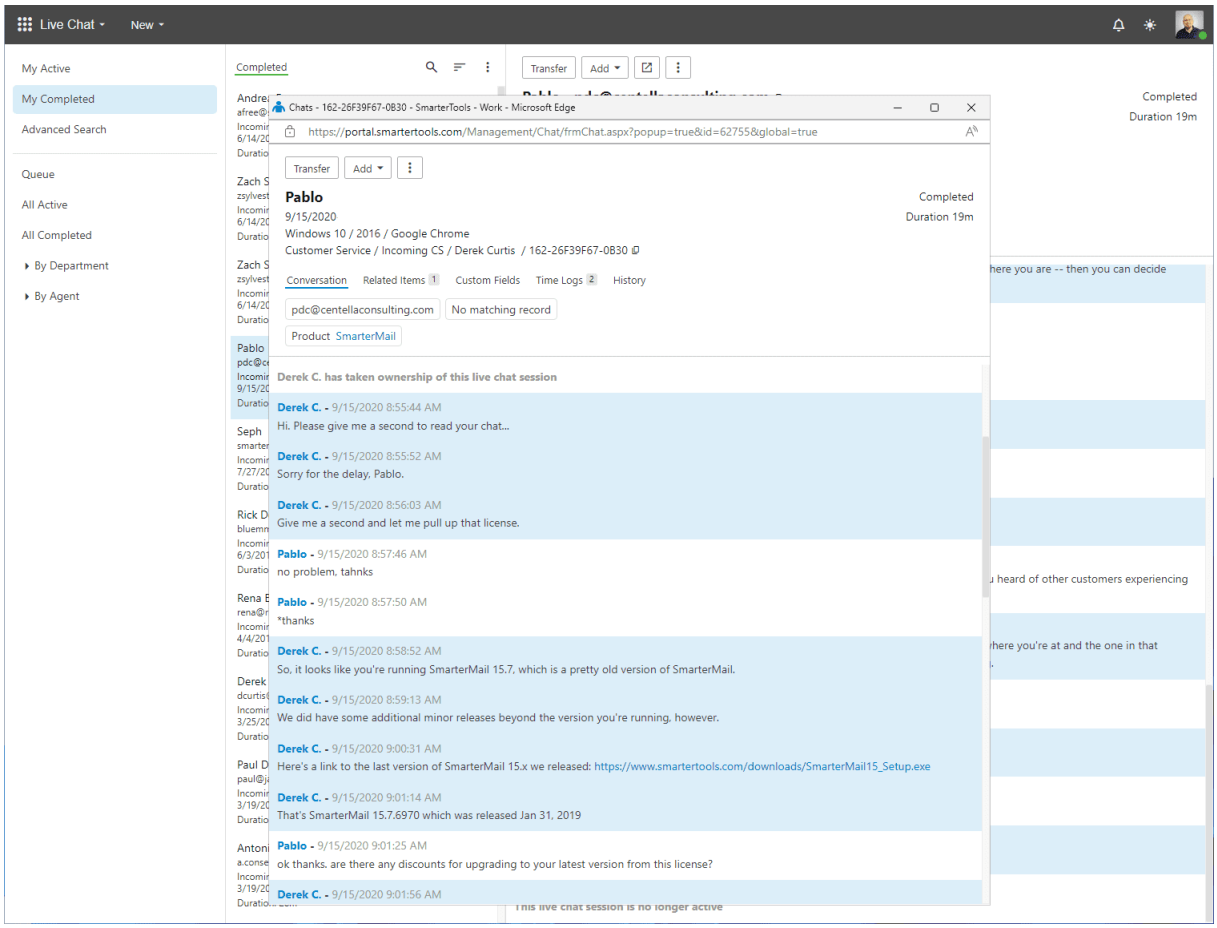
SmarterTrack's live chat feature gives businesses the ability to reduce phone calls, improve customer support, and assist customers in a way that they are more likely to use. Studies have shown that use of live chat as a customer service method has increased, year over year, since the explosion of mobile devices. Therefore, having that as an outlet will endear your customers to you, plus it can increase agent efficiency as they can handle multiple chats at one time. (Should you choose to allow them to.) Live chat can be set up so that users see relevant KB articles prior to submitting the chat to an agent, which could help reduce the amount of agent interaction that's required, helping reduce, or at least manage, your overall support costs.

Live chats can be started on the portal or directly from one or more pages of your website by

integrating live chat using simple text links or icons, then adding fully customizable text and colors so that your live chat complements your site.

To access Live Chats within the management interface, log into SmarterTrack as an agent and select Live Chat from the navigator. Depending on the role you are assigned, an agent may only see My Active and My Completed tabs in the content pane, which shows all live chats that are currently assigned to them, or chats they have previously participated in. Managers and administrators have the ability to see all live chats -- active and/or completed -- across multiple departments, based on their permission level.

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



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

Navigating SmarterTrack's Live Chat Interface

Agent Live Chats vs. Global Live Chats

The Live Chats section organizes all of the live chats for which an agent is responsible. When an agent accesses the live chat area by clicking on it in the navigator, all active live chats for the agent will load in My Active. Agents can also view any inactive chats that they have previously had with end users by selecting My Completed.

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

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

Regardless of whether you're accessing your own live chats or global live chats, all active or completed chats in the system will load in the content pane when you open the respective live chat section. In general, the following information is displayed:

- User - The name the customer would like to be called during the chat.
- User Email - If the user provided an email address, it will be displayed. Otherwise, "No Email Address" will appear.
- Group/Agent - The group to which the live chat was assigned, and the agent who handled the chat.
- Started - The date and time the chat originally started.
- Duration - The amount of time the chat lasted. For active chats, the idle time is displayed as well.

Sorting

Clicking on sorting icon in the content pane allows you to change how active and completed chats are displayed. Final sort order uses the chat's idle time as the deciding factor. For example, 3 chats from the same customer will sort from least idle to most idle, or vice versa, when sorting the User column in either ascending or descending order.

Performing Live Chat Actions

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

- Select All - Selects all chats within the content pane.
- Transfer - Transfers the selected chat(s) to another group or agent. For more information on transferring a live chat, see Transferring Live Chats .
- Delete - Click this button to delete the selected live chat(s). For more information on deleted chats, see Deleting Live Chats .

Live Chat Distribution Methods

There are two basic ways live chats are handled, which essentially mirrors ticket distribution methods: agents can manually Pull from Queue or chats can be automatically distributed based on whether an agent is in a primary or secondary group. Individual agents can be set up so that each has a different way chats are handled. That gives managers the flexibility to have agents take back up roles as needed for times when live chats are particularly heavy. Chat Handling is set up for each agent on the Agent-Group Relationship modal by navigating to a Group, selecting the Agents tab, then double-clicking on an agent.

Pull from Queue

By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry-pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers, who are acting as back up, or agents-in-training who want to participate in the group but may not have the skill, experience, or knowledge to be handed chats automatically just yet.

Administrators that choose this distribution method should note the following:

- Live chats are never assigned to agents automatically.
- An audible alert will notify agents when a live chat is in the queue. The basic notification sound can be configured in the same manner as the other chat sounds.
- If there are no agents receiving live chats, the system will treat chat as offline.

Automatic Chat Assignment

Most companies will use this distribution method for live chats because it attempts to give all of the agents an equal percentage of the workload. Under this distribution method, each agent has a Max Active Live Chats setting (which is available by going to Settings > Employees, selecting an employee and clicking on their Live Chats tab) that sets the max number of concurrent chats they can work on at a time. When a new live chat is initiated, the system checks the active agents within the live chat group to determine which agents have not met their maximum limit. The live chat is then assigned depending on the number of live chats the agent is working on and the amount of time that has passed since a live chat was last assigned to the agent.

For example, assume a company has three agents, Joe, Bob, and Sue. Sue is very experienced and can handle up to five chats at once. Joe and Bob are relatively new, and can handle one and two simultaneous chats at once. If none of the agents are engaged in a live chat when a new live chat is initiated, the system will perform the following checks to determine which agent will receive the live chat:

- The system will first check to see who has the lowest percentage of capacity.
- The system then checks to see which agents have the lowest number of live chats.
- Finally, the system checks to determine which agent has the earliest Last Chat Ended time.

So in the example above, the agents with the lowest percentage of capacity are Sue, Bob, Joe. All of the agents have the same number of live chats (none), but the most time has passed since Joe participated in a live chat. Therefore, the system will assign the live chat to Joe.

The automatic distribution of chats is also based on whether the agent is part of the Primary or Secondary group:

• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, via round-robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
• Secondary Group - Agents in the secondary group will receive automatic round-robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

Agent Status and Live Chat

Within SmarterTrack, each department that is added can be broken down into individual groups, with each group containing different agents. Of course, departments do not have to have multiple groups, but each department needs to have at least ONE group. That said, multiple groups within a department can serve a purpose. For example, a support department may have a Level 1 support group that consists of less experienced support agents who initially triage issues and handle basic support requests. Then, there is a Level 2 group that consists of more experienced support agents who handle more complex issues that require more time and potentially more interaction with the customer. Then, there may be a support management group that oversees the day-to-day, but that can also participate in things like ticket responses and live chats. Each group may have different permissions assigned to it, and different ticket and live chat handling rules, but having multiple groups gives an organizations the ability to assign agents within a single department varying levels of responsibility and/or access to information.

In addition, each agent within each group has a status of "active" or "inactive". Active status indicates that the agent can be assigned new tickets and/or live chats. Therefore, an agent with an inactive status cannot be assigned new tickets and/or live chats. During business hours, most agents should be active, and only go inactive if they are in the middle of a larger task, if they're away from their desks, etc.

Managers can view and edit the status of agents within each group from the Agent Dashboard. They simply select Dashboards from the Navigator and select it from the

navigation pane. This dashboard shows active and inactive agents, and managers can edit an agent to change their status as needed. For example, Joe stepped away from his desk to talk to someone in another department about a customer issue. The manager notices he's back at his desk, but he forgot to change his status from "inactive" to "active" -- the manager can use the Agent Dashboard and manually set Joe to an "active" status.

It's worth noting that making an agent Active does NOT necessarily mean they'll actually be assigned a live chat. That is also dependent on their availability. If, on the Agent Dashboard, an agent is "active" but they're "unavailable", they will not be automatically assigned a new live chat when it comes in, though they can take that live chat. In order for an agent to be assigned a live chat, they must be "available" as well as "active" in the group. If the manager notices that an agent is showing up as unavailable, they should find out why. It could be that they're on a phone call using SmarterTrack Communicator, so they were automatically set to unavailable by SmarterTrack, or they manually set themselves as unavailable when they took a call using another soft-phone.

The Agent Dashboard gives managers the ability to view the following information:

- Active and Inactive tabs that list agents by their status.
- The availability of the agent -- whether they're "available" or "unavailable".
- Both tabs display the Ticket, Chat, and Call groups the agent is part of, and their status in each. For example, Joe is a member of 6 ticket groups. However, his "Ticket Groups" shows 4/6. That means he's set at "active" in 4 of those 6 ticket groups.
- The number of Active Tickets assigned to each agent.
- The number of active live chats assigned to each agent and the number of concurrent live chats they can handle. For example, Beth is set to take 3 concurrent live chats. Her "Active Chats" status shows 1/3, meaning she has 1 active chat out of the 3, total, she can take.
- Whether the agent is on an active call or not. (NOTE: This column is only used in conjunction with the SmarterTrack Communicator.)

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

Viewing Live Chat

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

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

- End Chat - Ends the live chat session.
- Take - Allows an agent to take a live chat, either from the queue or from another agent, and begin actively replying to the end user.
- Transfer - Transfer the live chat to another group or agent.
- Add - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the live chat.

- Comment - Adds a comment to the chat. Agents can select the type of comment they want to add: General, Resolution, Transfer, Follow-Up, or Sticky. Comments will appear on the Comments tab. Comments are only visible to agents and managers.
- Related Item - Adds an existing ticket, call log or live chat to the chat. When an agent adds a related item to a chat, this information is stored in the Related Items tab.
- New Task - Allows the agent to create a new task then attaches that task to the chat. When an agent adds a task to a chat, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- New Time Log - Allows the agent to create a new time log then attaches that time log to the chat. When an agent adds a time log to a chat, this information is stored in the Time Logs tab.
- New Ticket - Allows the agent to create a new ticket based on the chat, then attaches that ticket to the chat. When an agent adds a ticket to a chat, this information is stored in the Related Items tab and the ticket is assigned to whomever the agent selected when creating the ticket.
- New Call Log - Allows the agent to create a new call log then attaches that call log to the chat. When an agent adds a call log to a chat, this information is stored in the

Related Items tab and appears in the Call Logs section of the management interface.

• Pop-out - Allows the agent to open the chat in a pop-out window.

• Actions (...) - Click this button and select the appropriate option to perform any manual events created for live chats.

• Delete Chat - Only available on completed chats, this will delete the chat.

• Email Transcript - Only available on completed chats, this allows the agent to email a transcript of the chat to the user, and will pre-fill the Email Address with the address entered by the user. However, the agent can change that or add additional addresses separated by semicolon.

• Print - Allows the agent to print the chat conversation as well as the header and any custom fields. Note: If viewing the management interface from a mobile device, this option may not be available.

• Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted in the live chat response.

• Send File - Allows the agent to send a file, like a screenshot or a document, to the person they're chatting with.

• Email Transcript - Allows an email to be sent containing the text transcript of the conversation. Emails can only be sent to a single recipient.

• Assistance - Shows the agent any relevant KB articles that may help with answering questions or troubleshooting.

• Translate - Only available on completed chats, this will actively translate the contents of the chat.

• Manual Event - If there are manual events set up for live chats, they will appear at the bottom of the Actions menu. Otherwise, 'No manual events available' will appear.

Tabs within the Live Chat

Live chat information is organized within the following tabs. (NOTE: A tab is only displayed for a chat if there is an item associated with that tab. For example, if there are no attachments for a chat, the Attachments tab is not displayed.)

• Conversation - This displays the text of the live chat as well as any custom fields being used.
• Comments - This tab displays any comments agents would like to note about the chat or customer. Comments are only visible to agents.
• Attachments - This tab lists any files that were uploaded to the chat by an agent or customer.
• Time Logs - This tab lists any time logs attached to the live chat.
• Related Items - This tab lists any tickets, time logs, tasks or files attached to the ticket.
• Custom Fields - This tab includes any custom fields the administrator created to help customize your company's chats. This information can be populated by a user, an agent, or a third-party application (via the administrator).
• History - This tab summarizes any actions associated to the chat.
• Survey - This tab displays any completed surveys that are associated with the live chat, including their completion date and eventual rating. Users can double-click on the survey to bring it up in a new window.

Viewing User Details

In many instances you'll notice the user's email address has an underline when viewing a ticket. Clicking on an email address with an underline opens a pop-out window that allows you to all of the information SmarterTrack has gathered for that particular User. Much of this information can be added or edited in the Users and Organizations area, but much of it is gathered by SmarterTrack itself. The pop-out is comprised of a number of different tabs, including:

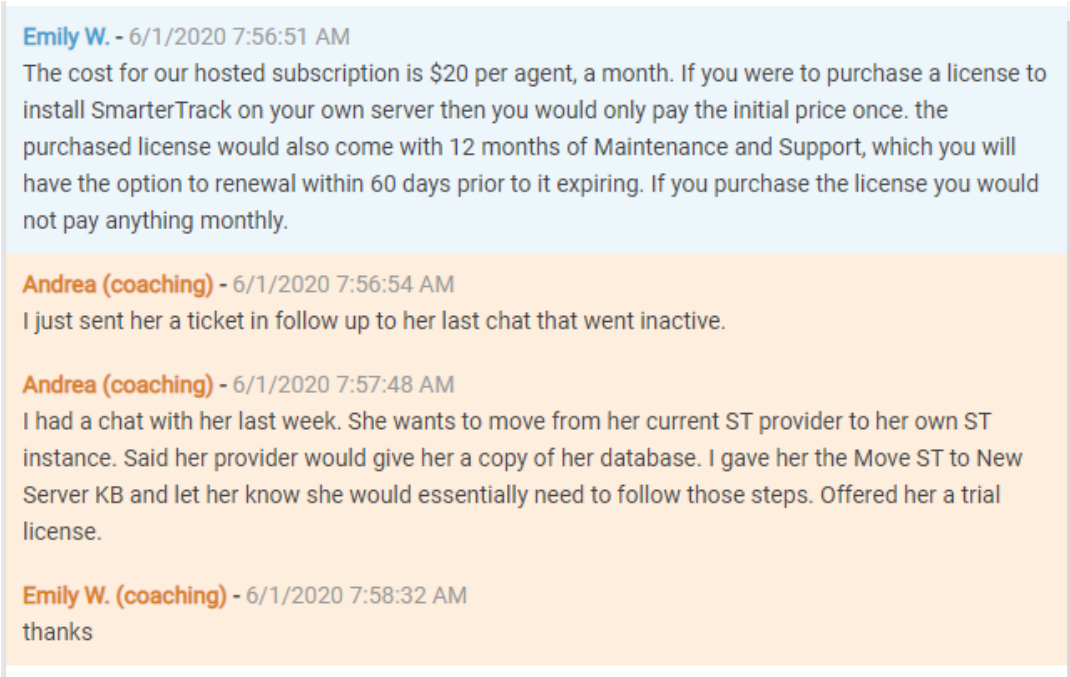
• Details - The Details tab displays a variety of data about the user. For example, the user's authentication method, their Time Zone, their preferred language and more.
• Contact Info - If the User has any detailed contact info, such as a website URL, home or work cell numbers, a company address, etc., it will be displayed here.
• Portal Settings - Details include whether a custom avatar is in use and approved, whether the User subscribes to Community posts automatically, etc.
• Roles - This displays the various Roles for the User.
• Custom Fields - If any Custom Field data is associated to the User, it will be displayed here.

• Comments - If any comments have been added to the User, they will be displayed. Comments can include details about their Organization, preferred methods of contact, etc.
• Tickets - This tab lists all of the tickets in the SmarterTrack system that have been submitted by the email address associated to this User. The ticket status, subject, the number of messages in the ticket thread, the agent assigned to the ticket and additional information is displayed. Agents can perform actions on these tickets such as viewing them, merging them with other tickets, etc. All of this information is pulled directly from SmarterTrack and it helps agents get an overall picture of the number and nature of issues the User has reported. This is especially handy if a User has had a number of similar issues in the past -- they're easily accessible by an agent from the Tickets tab.
• Live Chats - This tab lists all of the live chats in the SmarterTrack system that have been started by the email address associated to this User. The chat group, dated and time the chat was started, the chat queue time and additional information is displayed. Agents can perform actions on these chats such as viewing them, starting a ticket from a chat, etc. All of this information is pulled directly from SmarterTrack and it helps agents get an overall picture of the number and nature of issues the User has reported. This is especially handy if a User has had a number of similar issues in the past -- they're easily accessible by an agent from the Live Chats tab.
• Calls - This tab details the number of call logs that were created for the User. Information available includes the phone number of the User, the Group the call was created for, the call duration and more. Call logs can be viewed, tickets can be started from them and more.
• Survey - This tab details the surveys that the User has submitted. It includes the survey's name, its completion date, the associated item the survey was completed for, the survey score and more.
• Forms - If a user has submitted a form, or a number of forms, they will be displayed here.
• Statistics - The Statistics tab shows the User's activity over the course of several days. This includes the number of tickets, live chats, calls and time logs completed for the User in the Last 7 Days, Last 30 Days, Last 90 Days and All Time.

- History - This tab shows historical information such as the last time the User logged in to SmarterTrack, the last time they submitted a ticket, their last live chat, etc.

Coaching Agents During Live Chats

With SmarterTrack's included coaching functionality, other agents and/or managers can provide assistance to an agent during active live chats "behind the scenes". This is a great way for organizations to aid in agent training and efficiency, while ensuring the customer receives accurate information. For example, a manager can participate with the agent in real time, offering advice, reminding them of special sales or customer incentives, guiding a new agent in ways to direct a conversation and more.



During a live chat, when an agent or manager views an ongoing chat they'll have the "Coaching" text box available to them. It displays to the right of the standard response window and has a background color to differentiate it within the chat itself that helps the agent know that they're being coached. Typing inside that coaching area displays the contents of the message to the agent, but not to the customer. And, when the coaching message is sent, it appears inline with the rest of the chat so it's in front of the agent, and they can even reply as needed by similarly typing in the coaching window.

Transferring Live Chats

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

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

- New Brand - The brand the chat should be transferred to. Note: This will only appear if there are multiple brands set up in SmarterTrack.
- New Group - If the chat should be transferred to a new group, select it from this dropdown list.
- New Agent - Select the new agent who will be taking the chat. If the chat does not need to transfer to a specific agent, choose the auto-assign option and it will be assigned to an agent within the specified group based on the distribution method set by the administrator.
- Transfer Comment - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the live chat was transferred.

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

Live Chats in Queue

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

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

By default, users who are waiting in the queue will see a message with a count of the number of users ahead of them. However, that message can be customized at the live chat Departments settings .

For information about how SmarterTicket assigns live chats from the queue, see Live Chat Distribution Methods .

Deleting Live Chats

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

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

purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Live Chats

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

Basic Search

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

Advanced Search

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

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

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all live chats EXCEPT deleted ones or to only search in deleted items.
- Chat Number - To search by chat number, enter the chat number in this field.
- Search String - Type the specific keywords to be queried. All sections of the chats will be searched for these keywords.
- Email Address - To search by email address, enter the email address in this field.
- Customer Name - To search by customer, enter the customer's name in this field.
- Customer Username - To search by username, enter the customer's username in this

field.

• Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.

• Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.

• Agent - To search by agent, select the appropriate agent from the list.

• Status - To search by chat status, select the appropriate status from the list.

• Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.

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

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

Custom Fields

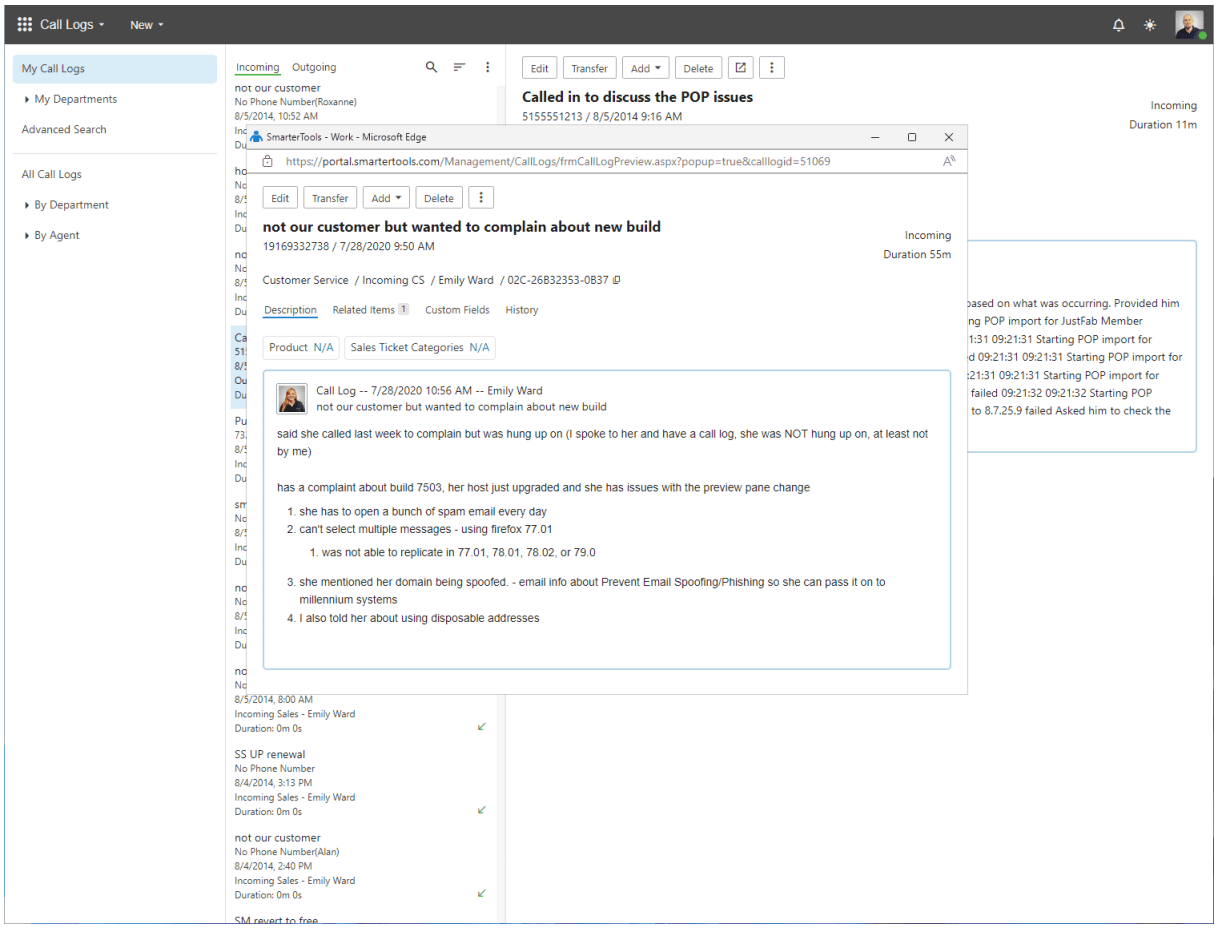
The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Call Logs

Call Logs Overview

SmarterTrack's call logging feature provides agents with the ability to track customer service and sales calls. By requiring agents to track their phone conversations, companies can help to eliminate calls from falling through the cracks and reduce the number of unresolved customer issues. In addition, managers can use call logs and their associated reports to determine the number of calls answered or placed per agent or group over a period of time. This helps them determine how much of an agent's workload is dedicated to calls, or to identify common phone complaints and their resolutions. In addition, if agents take more calls than live chats, it may be an indication that live chat isn't as present to customers and users as it should be, and more work needs to be done to how and where live chat is presented on the portal or on the business's website.

To access your call logs, log into the management interface with your agent account and select Call Logs from the Navigator.



Navigating SmarterTrack's Call Logs Interface

Agent Call Logs vs. Global Call Logs

The Call Logs section organizes all of the call logs for which an agent is responsible. When an agent clicks on My Call Logs in the navigation pane, their Incoming or Outgoing call logs will load in the content pane, depending on which tab is selected. (By default, the Incoming tab is selected.)

In addition, incoming and outgoing calls can be viewed by the department the agent belongs to. That means that every group the agent is active in will be listed and the agent can drill down into all incoming and/or outgoing calls for the department, or drill down into each group to see their incoming and outgoing call logs.

Administrators and managers who are members of multiple groups may want to view incoming or outgoing call logs for those groups to better evaluate the actual needs of the

organization or to gain valuable insight into company operations. To view all call logs in SmarterTrack, the manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see call logs for those groups. Once this is done, they simply click All Call Logs in the navigation pane. They can further review call logs By Department and By Agent.

Regardless of whether you're accessing your own call logs or global call logs, the call logs in the system will load in the content pane when you open the respective call log section. In general, the following details will be available:

- Subject - An agent-generated phrase that usually describes the call log. Very long subject phrases are truncated.
- Phone Number (Name) - The phone number (if available) and name of the caller.
- Date and Time - The date and time the call started.
- Group - Agent - The group that is assigned to this call log and the agent who handled the call.
- Duration - The length of the call.

Performing Call Log Actions

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

- Search - Allows the agent to search the call logs in the content pane.
- Sort - Sorts the list of call logs in ascending or descending order based on the selected option, such as start date, phone number, department, etc. Clicking on Reset Sort Order will return the sort order to its default status.
- Actions (...) - Click this button and select the appropriate option to transfer a call log or select all call logs.

- Select All - Selects all call logs.
- Transfer - Transfer the selected call log(s) to another group or agent. For more information, see Transferring Call Logs .
- Delete - Deletes the selected call log(s). For more information on deleted call logs, see Deleting Call Logs .

Creating New Call Logs

To create a new call log, click the New button in the Navigator and then select Call Log from the dropdown. Alternatively, an agent can click on the New button in the call log content pane. Regardless of the method used, a new call log window will open that the agent will use. Note: For companies using SmarterTrack Communicator, call logs can be configured to start automatically when a call comes in. In addition, if companies have integrated SmarterTrack with their existing VoIP system, call logs can be configured to begin automatically using the extensive web services.

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

The following fields will appear in the header of the call log. Note: When automating a call log, some of these fields may be autopopulated based on the fields available from the phone server. Agents using SmarterTrack Communicator will have phone number, start and end times, subject and a recording of the call added to each call log automatically. In addition, the call recordings associated to call logs will be compressed after 7 days of inactivity to reduce disk space and reduce the number of files on the server.

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

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

- Save - Saves the contents of the call log.
- Add - Allows the agent to attach an attachment, a new task, time log, ticket or related item to the call log. For more information on these options, see Viewing Call Logs .

Viewing Call Logs

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

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

- Edit - Allows the agent to modify the selected call log.
- Transfer - Transfers the call log to a new brand, group and/or agent. When clicking the Transfer button, a modal window opens and you are presented with the following options:

- New Brand - The brand you are going to transfer the log to. (If multiple Brands are set up.)
- New Group - The new group you are going to transfer the log to.
- New Agent - The new agent you are going to transfer the log to.
- Add - Agents can add other items to each call log. This helps in keeping all communication in a single location and neatly organized. It should be noted that adding something like a task or ticket to a call log does NOT change the status of either item. Click this button and select the appropriate option to add a new task or time log to the call log or to add an existing item to the call log.

- Internal Attachment - Adds an attachment from your local machine to the call log. When an agent adds an attachment to a call log, this information is stored in the Attachments tab and is only available for Agents. (They're not available to Users.)
- Related Item - Adds an existing ticket number to the call log. When an agent adds an existing item to a call log, this information is stored in the Related Items tab.
- New Task - Attaches a new task to the call log. When an agent adds a task to a call log, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.

• New Time Log - Attaches a new time log to the call log. When an agent adds a time log to a call log, this information is stored in the Related Items tab.
• New Ticket - Adding a ticket to a call log actually enables and agent to start a ticket for the customer based on their call. This is helpful for those issues where follow up is required for the customer or to transition customers from a phone call to a more cost-effective method of communicating.
• Delete - Deletes the call log. For more information on deleted call logs, see Deleting Call Logs
• Pop-out - Allows the agent to open the call log in a pop-out window.
• Actions (...)

• Print - Allows the agent to print the information contained in the description and details tabs of the task. Note: If viewing the management interface from a mobile device, this option may not be available.
• Assistance - Allows an agent to view relevant knowledge base articles based on the contents of the call log. These articles can then be used to help resolve customer issues.

• Manual Event - Selecting this opens a modal window. If any manual events are created for call logs, they are displayed here and available for use.

Tabs within a Call Log

Call log information is organized within the following tabs. (NOTE: A tab is only displayed for a call log if there is an item associated with that tab. For example, if there are no attachments for a call log, the Attachments tab is not displayed.)

• Attachments - This tab includes details about any files that are attached to the call, including who attached it, a link to the file, the file size and more.
• Time Logs - This tab includes any time logs attached to the call, including full details such as the time log category, duration and description.
• Related Items - This tab lists any related tickets that are attached to the current call log. Details include the ticket subject, a link to open the ticket in a new window, any attachments to the ticket and more.
• Custom Fields - This tab includes any custom fields the administrator created to help

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

• History - This tab displays information about the log, including when it was opened, the user who opened it and more.

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

Transferring Call Logs

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

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

• New Brand - The brand you are going to transfer the log to. Note: This will only appear if there are multiple brands set up in SmarterTrack.

• New Group - If the call log should be transferred to a new group, select it from this dropdown list.

• New Agent - Select the new agent who will be assigned the call log.

Click OK to transfer the call log.

Deleting Call Logs

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

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

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

Searching Call Logs

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

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the call log section you are viewing (e.g., Incoming call logs for an agent) for matches and display the results in the content pane. Note: The basic search functionality uses the Search String field for rendering results.

Advanced Search

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

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

General Criteria

The following fields are available:

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

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

Custom Fields

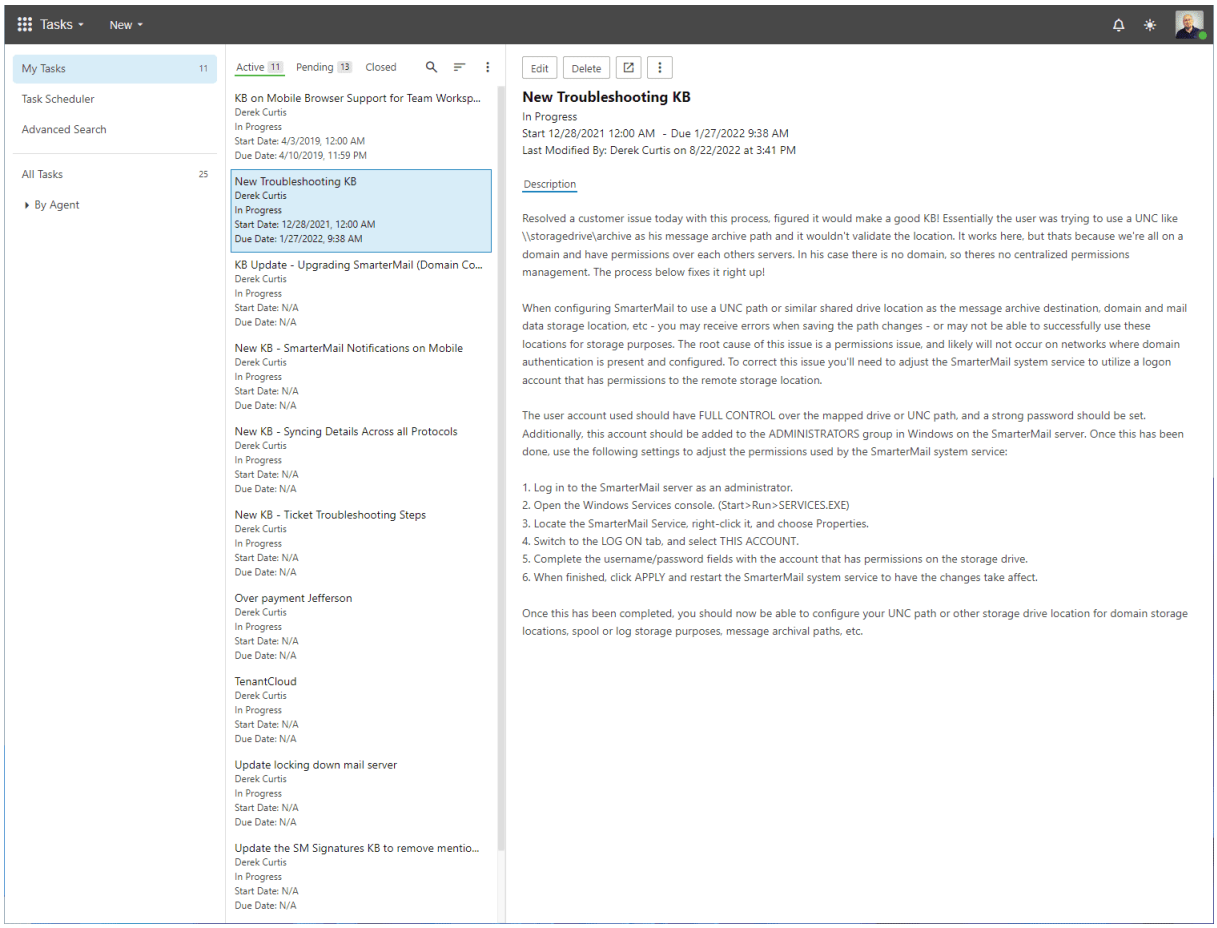
The administrator can create an unlimited number of custom fields, which can be used to further refine search criteria by complementing the General Criteria selected. For help with custom fields, consult your administrator.

Tasks

Tasks Overview

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Agents can create new tasks to organize their time, assign tasks to other agents and schedule tasks that regularly take place. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to create new tasks directly from any ticket, live chat, and call log in the system. These tasks are added as a Related Item on the corresponding ticket, live chat or call log and can also be reviewed in the Tasks section. This ensures agents can have all the information necessary to complete their tasks in one convenient location and better track the communications related to those tasks.

To access your tasks, log into the management interface with an agent account then select Tasks from the Navigator. You view your tasks based on their status via the content pane. Once you're in the tasks area, Active tasks are selected by default. However, you can change your view to Pending and Closed tasks simply by selecting the appropriate tab. Agents who are also assigned the Manager role can review tasks assigned to other agents in the All Tasks section of the navigation pane. "All Tasks" show just that: all tasks assigned to agents in the various groups assigned to the manager. They can also view tasks By Agent.



Navigating SmarterTrack's Tasks Interface

Agent Tasks vs. All Tasks

For agents, tasks are stored by their current status. Clicking on a status tab in the content pane displays all of the tasks with the status selected. Agents can click on a task and review its details in the preview pane or open a task in a new pop-up window by double-clicking on it.

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

Regardless of whether you're accessing your own tasks or all tasks, all tasks in the system will

load in the content pane when you open the respective task status. In general, the following details will be available:

- Subject - An agent-generated phrase that usually describes the task. Very long subject phrases are truncated.
- Owner - Indicates the owner of the task, either a specific agent or a related item. (E.g., a ticket, live chat or call log)
- Status - The status of the task. Active tickets include "In Progress" and "In Review" tasks; Pending includes "On Hold" and "Under Consideration" tasks; Closed includes "Completed" and "Rejected" tasks.
- Start Date - The date and time the agent should begin the task.
- Due Date - The date and time the agent should complete the task by.
- Completion Date - The date the specific task was marked as completed. (NOTE: This replaces the Due Date for Closed tasks.)

Sorting

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

Performing Task Actions

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

- Search - Allows for a basic search of all tickets displayed in the content pane.
- Sort - Sorts the list of Tasks in ascending or descending order based on the selected option, such as subject, start date, end date, owner, etc. Clicking on Reset Sort Order will return the sort order to its default status.
- Actions (...) - Click this button and select the appropriate option to transfer tasks, select all tasks, or to change the status or priority of tasks.

• Select All - Selects all of the tasks in the content pane.
• Transfer - Transfers the selected task(s) to another group or agent. For more information, see Transferring Tasks .
• Status - To change the status of a task, select the appropriate option from the list.

• Under Consideration - This is a task that has not been finalized or that is still in discussion.
• Approved - This is a task that is finalized but has not been started yet. Therefore, it's been approved by management and is ready to be worked on. (I.e., moved into In Progress)
• In Progress - This task is actively being worked on by an agent.
• On Hold - This is a task that is active, but may require follow-up or further action before it can continue to be worked on or marked with another status.
• In Review - This task is inactive, but it needs to be reviewed by upper management or go through some other review process before it can be marked as Completed or put back to In Progress for further action.
• Completed - This is a task that was successfully completed and closed.
• Rejected - This is a task that was rejected by management.
• Priority - To change the priority level of a task, select the appropriate option from the list.

• Low - The selected tasks have a low priority and will be sorted toward the bottom of the lists.
• Normal - The selected tasks have a normal or unspecified priority level.
• High - The selected tasks are a high priority and will be sorted toward the top of the lists.
• Urgent - The selected tasks are very important and will show at the top of the lists.
• Delete - Deletes the selected task(s). For more information, see Deleting Tasks .

Creating New Tasks

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Agents can create new tasks to organize their time, assign tasks to other agents and schedule tasks that regularly take place. To create a

new task, click New in the Navigator and then select Task from the dropdown. The following tabs are available in the new task window:

Options

• Owned By - Tasks can either be owned by an Agent or a Related Item. For tasks to be owned by a related item, the task must be created FROM the ticket, live chat or call log by selecting the item and clicking Add > Task. The task will then be listed on the Related Items tab of the ticket, live chat or call log. In the Tasks section, the related item number will be shown when editing the task.

• Agent - When a task is owned by an agent, the person creating the task can select a specific agent to assign the task to.
• Subject - The title of the task.
• Status - Select the status of the task. Generally, an agent will want to mark a new task as In Progress. For more information on tasks status, see the Tasks Overview .
• Priority - Select the priority level of the task. By default, tasks are set to normal priority.
• Start Date/Time - The date and time the agent should start the task.
• Due Date/Time - The date and time the agent should have the task completed.
• Original Estimate - When a task is created, the agent can add an estimated time it will take to complete the task in minutes, hours, days or weeks.
• Remaining Estimate - Adjusting the remaining estimate gives managers a better understanding of how much time is still needed to complete the task.
• Reminder - Select when to receive a reminder about an upcoming task. For example, if the agent selects 10 minutes, a reminder will pop up 10 minutes before the task is due.

Description

• Description - Allows an agent to type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.

Task Scheduler

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. In some cases, an agent's tasks will need to occur on a regular basis. For example, a human resources employee might schedule a biweekly task to complete payroll, while a supervisor might schedule a monthly review of his department's ticket workload. In these types of cases, a recurring task can be scheduled. When the task comes due (either at its start date or scheduled recurrence), a new task will be created with the details configured in the Task Scheduler.

Note: Scheduled tasks will continue to be created at their scheduled recurrence regardless of the status of previously created tasks. This means that if the tasks are not managed or marked as Completed, duplicate tasks will be available when viewing the tasks In Progress, Approved, etc.

To access the Task Scheduler, log into the SmarterTrack management interface with an agent account. Then click on the Tasks icon. In the navigation pane, click on Task Scheduler . When you create a new recurring task or edit an existing one, the Task Scheduler will load in a new window, and the following tabs will be available:

Options

- Subject - The title of the task.
- Agent - The agent that should be assigned the recurring task.
- Status - Select the status of the task that will be created. Generally, an agent will want to mark a new task as In Progress. For more information on tasks status, see the Tasks Overview .
- Priority - Select the priority level of the task that will be created. By default, tasks are set to normal priority.
- First Occurrence - The date and time the agent should start the first occurence of the recurring task.
- Original Estimate - When a task is created, the agent can add an estimated time it will take to complete the task in minutes, hours, days or weeks.
- Remaining Estimate - Adjusting the remaining estimate gives managers a better understanding of how much time is still needed to complete the task.

Description

On this tab, you can type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.

Recurrence Information

On this tab, you can set the frequency for how often the task needs to repeat. The recurrence feature is very flexible and can be as simple or as complex as necessary. Select whether the task should recur hourly, daily, weekly, monthly, or yearly. Then choose how often the task occurs. For example, if the task should occur every week, choose "Weekly" and leave the recurrence at "Every 1 week(s)." If the task should occur every third Monday, you would set the recurrence at "Every 3 week(s)," and select Monday from the list of days.

Deleting Scheduled Tasks

To stop a task from regularly recurring, delete the task entry from within the Task Scheduler. Note that deleting a task under your own task status or global tasks will delete that single task instance . If the entry is not removed from the Task Scheduler, a new task will be created at the next scheduled recurrence.

Viewing Tasks

To view a Task's details, simply click on it from the content pane its details will display in the preview pane. If you would rather view the task in a popup window, double-click the task instead. (You can also click the pop-out icon from the toolbar on the ticket itself.)

Generally, tasks are organized into different sections depending on whether they are under consideration, approved, in progress, on hold, in review, completed or rejected. To view tasks by status simply click on the desired status -- whether they're your own tasks or global tasks. All tasks with the selected status will load in the content pane. For more information on the options available when viewing a task, see Tasks Overview .

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

- Edit - Allows the agent to modify the selected task.
- Delete - Deletes the task. For more information on deleted tasks, see Deleting Tasks

- Pop-out - Allows the agent to open the task in a pop-out window.
- Actions (...)

- Manual Event - Selecting this opens a modal window. If any manual events are created for tasks, they are displayed here and available for use.

Content Pane Actions

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

- Search - Allows the agent to search the tasks in the content pane.
- Sort - Sorts the list of tasks in ascending or descending order based on the selected option, such as subject, status, due date, etc. Clicking on Reset Sort Order will return the sort order to its default status.
- Actions (...) - Click this button and select the appropriate option to transfer a call log or select all call logs.

- Select All - Selects all tasks.
- Transfer - Transfer the selected task(s) to another group or agent. For more information, see Transferring Tasks .
- Status - Allows you to change the status of the selected task(s).
- Priority - Allows you to change the priority of the selected task(s).
- Delete - Deletes the selected task(s). For more information on deleted tasks, see Deleting Tasks .

Transferring Tasks

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

To transfer a task, select the task in the content pane, then use the Actions (...) menu in the content pane toolbar and select Transfer from the dropdown. This will open a pop-up window with the following fields:

- New Agent - Select the new agent who will be taking the task. (NOTE: Tasks need to be assigned to specific agents, so there is no "auto-assign" option when transferring tasks.)
- New Status - Select the new status for the task, which is applied after the ticket is transferred.

Click OK to transfer the task.

Alternatively, agents can transfer tasks by viewing the individual task and selecting a new agent from the Agent dropdown. When the change is saved, the task will be assigned to the new agent.

Deleting Tasks

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

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

To stop a task from regularly recurring, delete the task entry from within the Task Scheduler. Note that deleting a task under your own tasks or global tasks will delete that single task instance . If the entry is not removed from the Task Scheduler, a new task will be created at the next scheduled recurrence.

Searching Tasks

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

Basic Search

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

Advanced Search

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

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

The following fields are available:

- Search String - Type the specific keywords to be queried. Then use the dropdown to select whether to search for this text in the subject and description sections of tasks, tasks subjects alone or comments on tasks alone.
- Related Item - To search by related item, type the number of the associated live chat, ticket, or call log.
- Agent - To search by agent, select the appropriate agent from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Status - To search by task status, select the appropriate status from the list.
- Items to Include - This dropdown allows you to select either all tasks EXCEPT deleted ones or to only search in deleted tasks.
- Start Date - To search by the date the task was started, enter the start date in the fields or click the calendars and select the appropriate dates.

- Due Date - To search by the date the task was due, enter the due date in the fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the last modified date, enter the date in the fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

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

Users / Organizations

Users / Organizations Overview

The Users / Organizations section allows agents to view all customer communication in one convenient location. Users (those who use SmarterTrack to submit the inquiries, issues and comments that agents work on) can be viewed individually to see their profile information, statistics of their contact with your agents, communication via tickets, live chats and calls, survey history and more.

Multiple users can also be grouped together into an Organization that displays all of the tickets, live chats, call logs, and surveys associated with its users. This is convenient for when more than one person from the same company is in contact with your business. For example, two users may be working together to complete a purchase. One of them will decide which product is needed; the other will complete the purchase. When the purchaser calls in to complete the transaction, rather than searching through all tickets, live chats and calls, the agent can simply look at their Organization to see the communications between other agents and representatives from the caller's organization.

To access the users and organizations, log into SmarterTrack as an agent and select Users / Organizations in the Navigator. By default, a list of all configured users will load in the content pane.

Navigating Users

Just like with agents, users can be assigned specific roles. By default, SmarterTrack offers three roles for users: Everyone, Registered User, and Registered User with Verified Email. Each role comes with a certain set of permissions, and administrators can create additional roles that can be applied to users. For example, an administrator may create a "Moderator" role that gives users moderate permissions for the Community. This role can then be given to specific users who actively participate and help others in your company's SmarterTrack Community.

As a result, when first accessing the Users / Organization area, the initial Everyone role is selected by default. As the name implies, this role is given to every user that's added to SmarterTrack, either through registration on the Portal or by some other means. To change the roles that are displayed in the content pane, simply select a different role.

In general, the following rows are available in the content pane when viewing the list of users:

- Display Name - The "friendly" name of the user.
- Username - The name used by the user to log in to the Portal.
- Last Login - The date and time in which the user last logged into SmarterTrack. For example, the last time they logged in to start a ticket, participate in the community, etc.

Navigating Organizations

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

- Organization Name - The name of the organization.
- Website - The website associated to the organization.
- Phone Number - The phone number that is associated to the organization.

Performing User / Organization Actions

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

- Search - Allows an agent to do a basic search of users or organizations.
- Sort - Allows agents to sort the list of Users or Organizations based on specific pieces of information, such as email address, website, etc.

- Send Verification Email - For Users only, this allows an agent to send a verification email to the user. Once verified, the user's role can be changed to "Registered User with Verified Email".
- Delete - Deletes the selected users or organizations. For more information, see Deleting Users and Deleting Organizations .

Creating New Users

To create a new user, log into SmarterTrack as an agent and click on the Users / Organizations icon. Then click New in the content pane toolbar. A new user window will open that the agent will use to create the user.

The new user window contains a tab to set the profile information for the user, a tab to configure standard options, such as a user's signature and avatar, a tab to choose roles to be associated to the user and a tab where the user's custom field data can be entered.

Details

Use this tab to configure the profile details of the user:

- Username - The username that will be used to log into SmarterTrack.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow users to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
- Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
- New Password - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
- Confirm Password - When using password authentication, this allows administrators to verify the new password by retyping it in this field.
- Force password change at next login - When enabled, this setting will force the specified user to change their password the next time they attempt to log in to the portal. This allows administrators to create new users with temporary passwords knowing that the user will have to reset it when they first log in. This checkbox remains

enabled for the specific user until they log in to the portal and change their password, at which time the checkbox is disabled. This setting also affects new users created via the SetUsersProperties API call. (NOTE: This setting does not apply to users authenticating via Active Directory.)

• Email Address - The user's email address.

• Display Name - The friendly name used to identify the user within the SmarterTrack system.

• Address - The physical address of the user.

• Time Zone - To specify the time zone, select the appropriate time zone from the list.

• Preferred Language - The language the Web interface should be shown in to this user. The list of languages in the drop-down menu is pulled from the list of configured Supported Languages.

Contact Info

Use this tab to set specific contact details for the user:

• Website - The user's personal website.

• Home Phone - The user's home phone number.

• Cell Phone - The user's cell phone number.

• Work Phone - The user's work phone number.

• Other Phone - The user's alternate phone number.

• Company - The name of the company the user works for

• Address - The user's physical address.

Portal Settings

Use this tab to configure standard Portal options for the user:

• Avatar Provider - SmarterTrack allows users to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.

• Avatar - The display picture as provided by the Avatar Provider or one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.

• Subscribe to community posts automatically - Checking this box allows the user to

automatically be subscribed to Community threads that they create or post in.

• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads users are subscribed to that have had a new reply or the status or type changed.

• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.

• Banned from community - Checking this box will ban the user from participating within the Community. While Community threads may be viewed, the user will not be able to reply to threads, comment on replies, vote on threads, etc. Banning a user here will display the user on the Banned tab within the Community, and banning a user in the Community will enable this setting. Note: Banning a user in the Community can only be done if the user has been reported for abuse.

• Portal Signature - Use this field to create an HTML-rich signature that will be displayed in the Portal, such as in Community threads and replies.

Roles

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

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

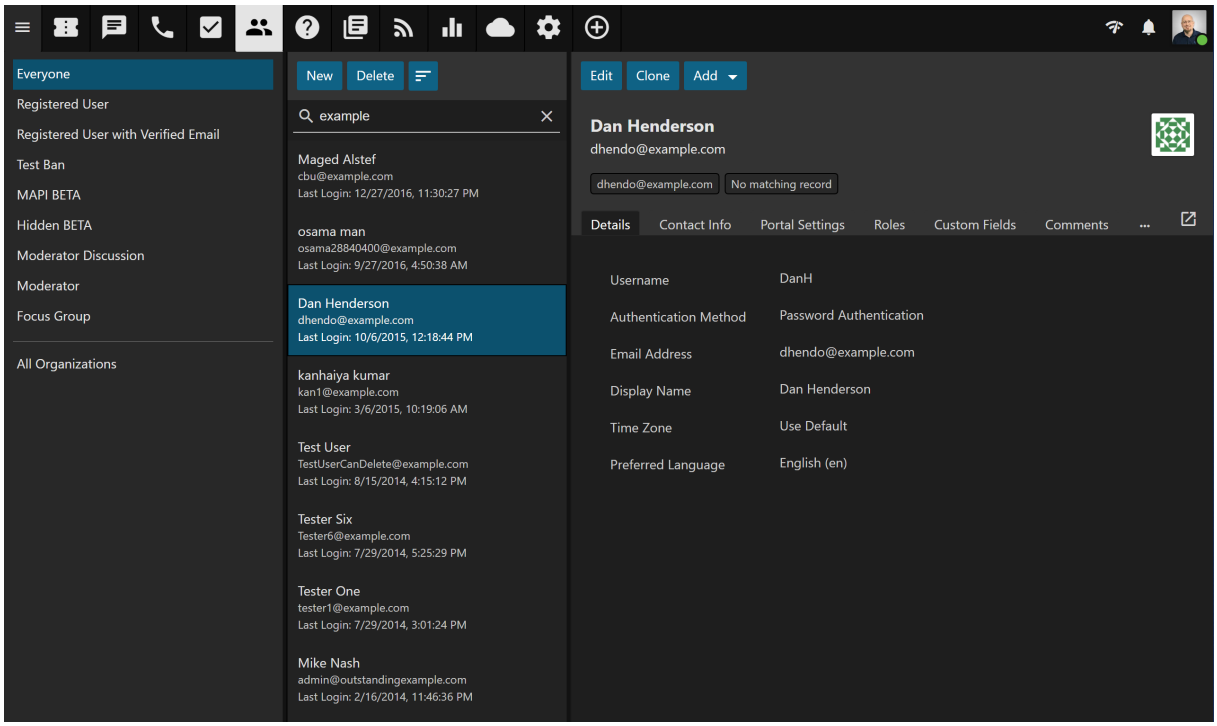
To remove a Role, simply uncheck it from the list and save your changes.

Custom Fields

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

Viewing Users

To view a user, simply click on the desired row and the user details will load in the preview pane. If you would rather view the user in a popup window, double-click the user instead. (You can also click the pop-out icon from the toolbar on the user itself.)



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

- Edit - Allows the agent or administrator to modify the selected user.
- Clone - Creates a new user with the same role permissions as the user being cloned.
- Add - Allows you to add items to the particular user:
- Comment - Add a comment about a particular user that's available to other agents and managers, but NOT available to the general public.
- New Ticket - Creates a new ticket with the user's email address in the To field.
- New Call Log - Creates a new call log with the user's email address in the Email field.
- Send Verification Email - Only available for users without the "Registered Users with Verified Email" role, this allows an agent to send the user a verification email. Once verified, they're automatically given the "Verified Email" registered users role.

Tabs within a User Preview

A user's details are organized within the following tabs:

- Details - Displays the profile information for the user, such as their username, email address, preferred language, etc.
- Contact Info - Lists any contact information about the user, such as their phone number(s), home address, etc.
- Portal Settings - Shows the user's portal settings, such as their avatar, the settings

selected for community actions and more.

• Roles - Lists the available roles and denotes which of them are assigned to the user.

• Custom Fields - Displays the custom fields that have been configured for the user.

• Comments - Displays any agent-added user comments. Note: User comments can be added by clicking Add in the toolbar of the User pop up window.

• Tickets - Displays all of the tickets that have been submitted under the user's email address.

• Live Chats - Displays all of the live chats this user has started with their account email address.

• Calls - Displays all of the call logs the user is associated to.

• Surveys - Displays all survey results for surveys the user has completed.

• Statistics - Displays statistics regarding the user's ticket submissions, live chats, calls and time logs.

• History - Displays information about the date and time of the user's last login, ticket, live chat, call and time log.

Viewing Users by Role

The navigation pane lists every role that can be applied to end users. To view a list of all users assigned to a specific role, expand the Users folder and click on the desired role. The list of users will load in the content pane.

Deleting Users

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

To delete a user, simply select the desired user(s) in the content pane. Click the Actions (...) icon in the content pane toolbar, then select Delete from the dropdown. (NOTE: Once a user is deleted, it cannot be recovered.)

Searching Users

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

Creating New Organizations

Multiple users can be grouped together into an Organization that displays all of the tickets, live chats, call logs and surveys associated with its users. This is convenient for when more than one person is in contact with your company. For example, two users may be working together to complete a purchase. One of them will decide which product is needed; the other will complete the purchase. When the purchaser calls in to make complete the transaction, rather than searching through all tickets, live chats and calls, the agent can simply look at their Organization to see their collaborative wants and needs.

To create a new organization, log into SmarterTrack as an agent and click New in the Navigator, then select Organization from the dropdown. The new organization pop up will open in a new window, and the following tabs will be available:

Details

- Organization Name - The name of the organization.
- Website - The organization's company website.
- Phone Number - The organization's phone number.
- # of Employees - A range for the number of employees for the organization.
- Address 1 - The physical street address of the organization, such as 123 W. Main .
- Address 2 - Additional address information such as suite number, floor, etc.
- City - The organization's city.
- State/Province - The state or province for the organization.
- Zip/Postal Code - The zip code or postal code for the organization.
- Country - The country where the organization is located.

Members

The Members tab on an organization displays the parameters used to associate users with the organization. To add a new parameter, click the Members button at the top of the preview pane, then choose Add from the dropdown. A new window opens. There are 4 filter types for adding members to an organization:

- Email Address - Used to add specific users into the organization by typing in their full email address. This is best used when you want to limit an Organization to only specific members.
- Username - Used to add specific users into the organization by typing in their specific username(s). As with Email Address, this is best used to limit an Organization to specific members.
- Domain Name - Used to add any users whose email address includes a specific domain name. To add any matching users, choose this filter type and enter the domain name (e.g., example.com). This is best used to capture any and all tickets, live chats, call logs and surveys submitted by any member of a specific domain.
- Phone Number - Used to add any users that have a matching phone number in their profile. To add any matching users, choose this filter type and enter the phone number.

You can add more than 1 parameter for any organization, like using domain name and then adding in specific email addresses for people who use addresses that are separate from the domain name entered. (E.g., contractors who are associated to a company.) Once your parameters are all complete, be sure to save the organization.

View Organization Tickets in Portal

Certain members can be granted permission to view all tickets that are associated with the organization. When a member is added by Username, Email Address or Domain, the setting, "View Organization Tickets in Portal", can be enabled. When this option is selected, the users will find an Organization tab on the Tickets page when they are logged in at the Portal.

Note: When a member that's added by Domain or Email Address is granted "View Organization Tickets in Portal" permissions, only the users who have the Registered User with Verified Email role will be able to view the organization's tickets at the Portal. For example, imagine I added a new member by Domain: example.com, and I enabled permission to view

the organization's tickets. Only the user accounts that contain an email address matching that domain and that have the Registered User with Verified Email role will be able to view the tickets submitted by all other members of the organization. However, when I add a member by Username and enable permission to view the organization's tickets, that user can view organization tickets, regardless of their verification status. Members added by phone number cannot be granted permission for viewing organization tickets.

Comments

Use the Add button to add internal comments that can only be viewed by other agents. If a comment has been added about the Organization, it will appear here. In addition, a number appears showing how many comments have been made about the Organization. If there is no number, then the Organization doesn't have any comments.

When an organization has been created, tickets, live chats, call logs and surveys associated to each member are pulled in and organized within the following tabs:

Tickets

This tab lists the tickets that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Display tickets that are associated with that user's account.
- Members by Email Address - Displays tickets where the member's email address is contained in the ticket's primary list of email addresses (the email addresses in the ticket header). Note that this only checks the email address for the ticket; it does not check the email address for any related user accounts.
- Members by Domain - Displays tickets where the member's domain is included in the ticket's primary list of email addresses (the email addresses in the ticket header). Note that this only checks the email address for the ticket; it does not check the email address for any related user accounts.
- Members by Phone Number - Displays any tickets associated with a user account that contains the member's phone number.

Live Chats

This tab lists the live chats that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays chats that are associated with the username's Used ID.
- Members by Email Address - Displays chats where the member's email address matches the email address of the chat. Note that this only checks the email address of the chat; it does not check the email address for any related user accounts.
- Members by Domain - Displays chats where the domain of the user's email address matches the member's domain. Note that this only checks the email address for the chat; it does not check the email address for any related user accounts.
- Members by Phone Number - Displays chats where the account for the user (if any) has the member's phone number.

Call Logs

This tab lists the call logs that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays call logs where the email address matches the email address for the member's account.
- Members by Email Address - Displays call logs where the email address matches the email address for the member's account.
- Members by Domain - Displays call Logs where the domain of the email address matches the member's domain.
- Members by Phone Number - Displays call Logs where the phone number matches the member's number.

Surveys

This tab lists the surveys that are associated with members of the Organization. The following logic applies to each member type:

- Members by Username - Displays surveys where the user ID that the survey was sent to matches the member's user account.

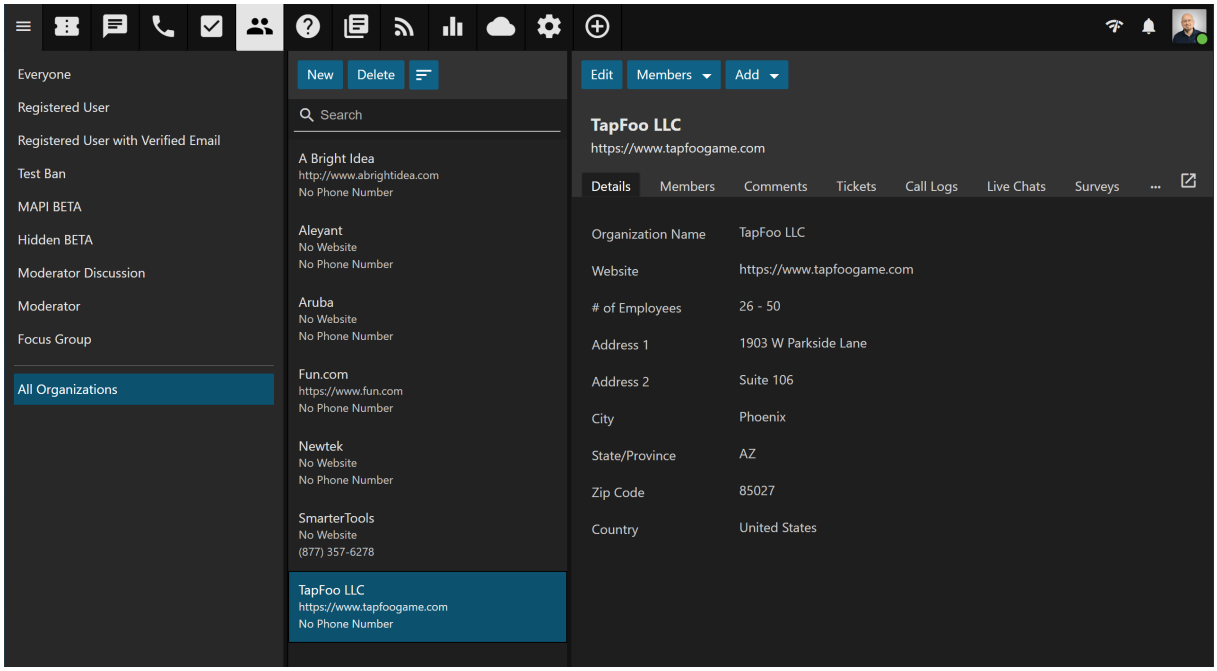
• Members by Email Address - Displays surveys where the email address that the survey was sent to matches the member's email address.

• Members by Domain - Displays surveys where the domain of the email address that the survey was sent to matches the member domain.

• Members by Phone Number - Displays surveys sent to a user who has a phone number that matches the member's number.

Viewing Organizations

To view an organization, simply click on it in the content pane. This will load the organization details in the preview pane. If you would rather view the organization in a popup window, double-click the organization instead. Note: Double-clicking an organization also enables you to edit it.



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

• Edit - Allows the agent or administrator to modify the selected organization.

• Members - Allows the agent or administrator to add, edit or delete filters for the organization.

• Add - Allows you to add items to the particular Organization:

• Comment - Add a comment about a particular Organization that's available to other

agents and managers, but NOT available to the general public.

• New Call Log - Creates a new call log with the user's email address in the Email field.

Tabs within an Organization Preview

An organization's details are organized within the following tabs:

• Details - This tab shows the information added when the Organization was initially created.

• Members - This shows the "filters" used to add Members to the Organization.

• Comments - If a comment has been added about the Organization, it will appear here. In addition, a number appears showing the how many comments have been made about the Organization. If there is no number, then the Organization doesn't have any comments.

• Tickets - This tab lists the tickets that are associated with members of the Organization.

• Call Logs - This tab lists the call logs that are associated with members of the Organization.

• Live Chats - This tab lists the live chats that are associated with members of the Organization.

• Surveys - This tab lists the surveys that were submitted from members of the Organization.

• Forms - This tab lists the forms that were sent to members of the Organization.

Deleting Organizations

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

To delete an organization, simply select the desired organization(s) in the content pane. Click the Actions (...) icon in the content pane toolbar, then select Delete from the dropdown. (NOTE: Once an organization is deleted, it cannot be recovered.)

Searching Organizations

To perform a basic organization search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will search all of the configured organizations and display the results in the content pane.

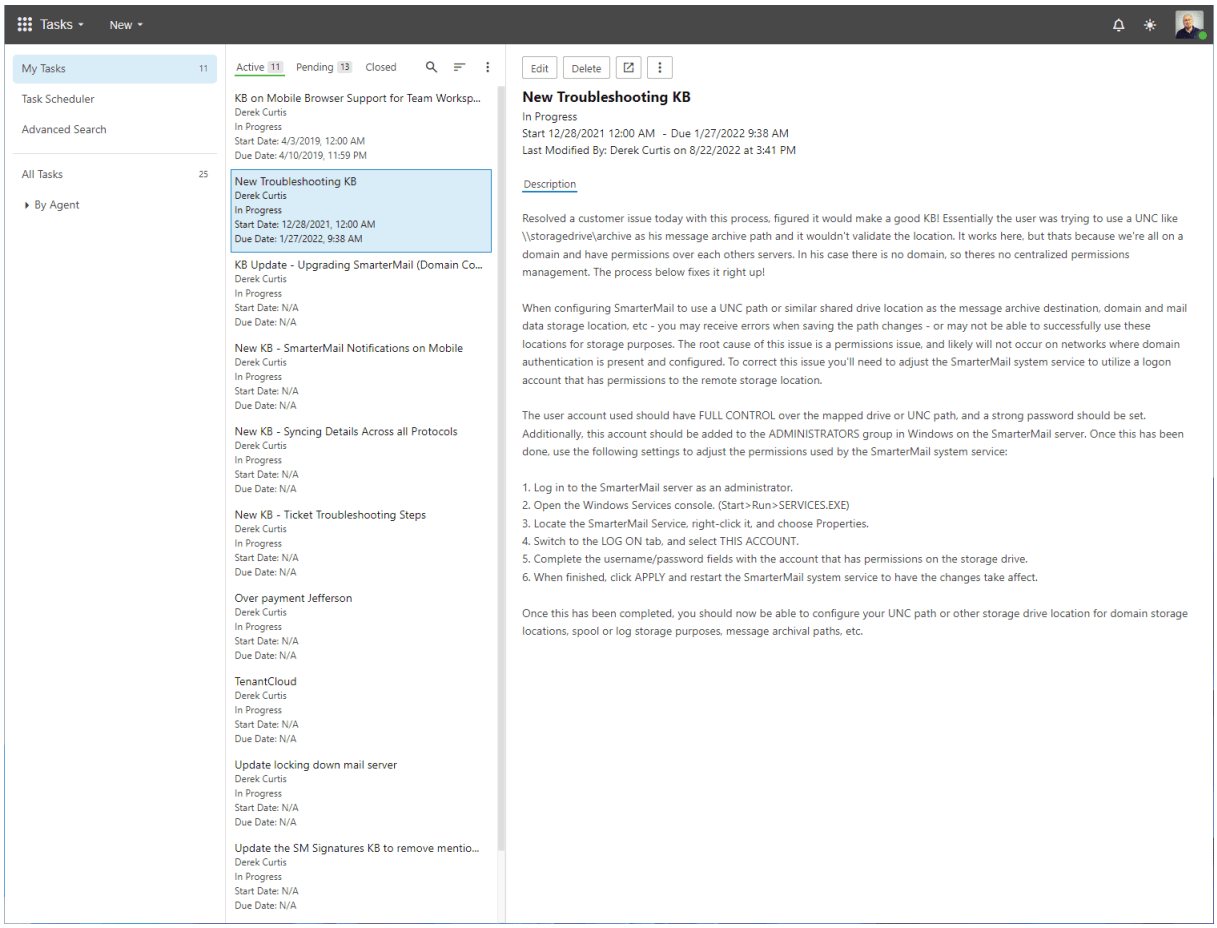
Knowledge Base

Knowledge Base Overview

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

To access the knowledge base, log into the management interface with your agent account. Then select Knowledge Base from the Navigator.

By default, SmarterTrack will display knowledge base articles for all brands. However, agents can review articles for a specific brand by selecting it from the brands dropdown at the top of the navigation menu. Articles can be edited from the preview pane by selecting the Edit button. Alternatively, they can be opened in separate pop-out windows by double-clicking the article in the content pane.



Navigating the Knowledge Base

In the navigation pane, you can select articles that then display in the preview pane. The following views are available under the Knowledge Base area of the navigation pane:

- All Items - Managers and administrators will be able to see all articles in the knowledge base, regardless of their status or to whom they're assigned.
- Drafts - Lists all articles flagged as drafts.
- Review - Lists all articles flagged for review.
- Moderation - Lists all articles that have unmoderated user feedback.
- Stale - Lists all articles that have reached their stale date. The timeframe for when articles become stale is set in the Management Interface settings .
- Broken Links - SmarterTrack scans articles for any broken internal or external links. This lists all articles that contain broken links.
- Advanced Search - Allows for a more advanced search of all knowledge base articles.
- By Agent - Lists all agents who have articles assigned to them.

In the Folders area of the navigation pane, a list of all existing folders will be available. Folders can be created for products, issue types or in any other way to keep your articles organized and easy to access, both for customers and for agents. Click on the folder or subfolder and the articles within that folder will load in the content pane. For more information on organizing articles by folder, please see Managing Knowledge Base Folders .

In the content pane, the list of articles can be found. In general, the following details can be seen for each article in the list:

- Article Title - The title of the article.
- Folder - The location of the article.
- Language - The language(s) assigned to the article. When portal visitors select a different language for the portal, the articles that have been assigned to that language will appear in the knowledge base.
- Flags - Whether the article is flagged as draft, private or for review.

Performing Knowledge Base Actions

Article Organization

There are two (2) tabs at the top of the content pane: "All" and "Assigned to Me".

Selecting "All" displays all of the articles, regardless of folder, that you, as an agent or manager, are able to see. Selecting "Assigned to Me" displays just those articles that have been actually assigned to you, as an agent or manager. When creating articles, they can be assigned to individuals as needed. Generally, articles are left unassigned so that they are available to all agents within the brand. However, agents can create articles and assign them to themselves, so that they "own" the article and are responsible for its content and keeping it updated. Agents are also notified if new feedback is generated on the article they're responsible for.

Actions

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

- Search - Allows you to perform a basic search on the articles listed in the content pane.
- Sort - Sorts the list of articles in ascending or descending order based on the selected

option, such as subject, helpfulness, last reviewed, etc. Clicking on Reset Sort Order will return the sort order to its default status.

• Actions (...) - Click this button and select the appropriate option to select all articles, move articles, copy articles or change the status of articles.

• Select All - Selects all knowledge base articles in the content pane.

• Mark - Click this button and select the appropriate option to change the status of the selected article(s).

• Public - Marks the article as public so tha it's visible in the Knowledge Base area of the portal.

• Private - Marks the article as private. Private articles are only visible to administrators and managers/agents and are great for internal guidelines, policies, troubleshooting steps or any other information needed by agents and managers.

• Draft - Marks the article as a draft. Drafts are only visible to administrators and agents. Draft articles are those that are essentially finished but are still awaiting review and/or revision prior to making them public or private.

• Review - Marks the article for review. Agents typically flag an article for review when they want the article edited for content, clarity, or grammatical errors.

• Reviewed - Marks the article as reviewed and clears the "Review" flag.

• Move - Moves the selected article(s) to another folder.

• Copy - Copies the selected article(s) to another folder.

• Transfer - Transfers responsibility for the article to a new agent.

• Rescan All for Broken Links - Initiates a scan of all articles for any broken URLs or links to external and/or internal content.

• Delete - Deletes the article. See Deleting Knowledge Base Articles .

Creating New Knowledge Base Articles

To create a new knowledge base article, select New in the Navigator and select Knowledge Base Article . When you do, a pop-up window will open that the agent will use to create the article.

The new article window contains a tab to compose the article, a tab to set the article language, and a tab to assign the article to one or more brands.

Compose Tab

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

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

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

- Title - Type the title of the article in this field. This will also act as the link to the article, so a good idea is to use a keyword-rich title for your articles so that your article URLs are SEO-friendly.
- Summary - Type a brief summary of the article in this field. This summary text is automatically used to generate an SEO meta description tag for the article. This tag is an HTML attribute that provides a concise summary of the web page. These descriptions commonly appear underneath the blue clickable links in a search engine results page (SERP). Note: While there is a 256-character limit to article summaries, we recommend keeping the summary under 160 characters, as search engines generally truncate snippets longer than 160 characters.
- Folder - To specify the folder in which this article should appear, select the appropriate folder from the list.
- Assign To - To select an agent who will be responsible for the article, select the agent from the list.
- Flags - Flag the article as private, draft, for review or featured on portal.

- Private - Marks the article as private. Private articles are only visible to administrators and managers/agents and are great for internal guidelines, policies, troubleshooting steps or any other information needed by agents and managers.
- Draft - Marks the article as a draft. Drafts are only visible to administrators and agents.

Draft articles are those that are essentially finished but are still awaiting review and/or revision prior to making them public or private.

• Review - Flags the article for review. Agents typically flag an article for review when they want the article edited for content, clarity, or grammatical errors.

• Featured on Portal - This flag will highlight an article so that it appears listed under the folder name on the Knowledge Base main page.

• WYSIWYG Editor - The what-you-see-is-what-you-get (WYSIWYG) editor where the article is created.

Brands / Languages Tabs

Both the Brands and Languages tabs allow you to set the brand(s) the article is associated to, as well as the language(s) available. Regardless of whether there is 1 brand/language or 10, each are listed and can be activated simply by using the checkbox next to each option.

Managing Knowledge Base Folders

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

Creating Knowledge Base Folders

To add a new folder, click the icon in the lower, left corner of the navigation pane toolbar and select Add Folder . (You can also edit existing folders or delete folders from here.) This will open a new folder window with the following fields:

• Folder - The name of the new folder.

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

• Include articles in automatic searches - Enabling this means that any article added to this folder will be included in any automatic searches and article display prior to users submitting live chats or tickets using your portal.

Click Save .

Moving Knowledge Base Articles to Another Folder

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

It's also possible to move articles using a right-click "context" menu. Simply select the article(s) and right-click on one of them. A context menu options. From here, simply select Move and select the name of the destination folder.

Renaming and Deleting Folders

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

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

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

Viewing Knowledge Base Articles

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

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

- Edit - Edits the selected article.
- Clone - Creates a new article that is based on the article being cloned. This includes all content of the article as well as its general settings (Brand, Language).
- View in Portal - Loads the selected knowledge base article in the portal. Viewing the article in the portal allows agents to see the layout of the article as portal visitors will see it.
- Transfer - Transfers the ticket to a new agent.

• Add - Click this button and select the appropriate option to add a comment or rating to an article.

• Delete - Deletes the selected article. For more information, see Deleting Knowledge Base Articles .

• Actions (...) - If any manual events are available on knowledge base articles, they will appear in this menu.

Tabs within an Article

Article information is organized within the following tabs:

• Content - The text of the knowledge base article.

• Feedback - The feedback left by readers of the article.

• Broken Links - This lists any links contained within the article that are "broken". That is, any links that return errors when they're clicked on, such as a 404 or "Not Found" error. (NOTE: This tab will only appear if there are items to display.)

• Translations - The linked translations of the article.

• Statistics - Lists a number of statistics for the article, including user and spider visits across various timeframes.

Viewing Articles by Status

Occasionally, agents and administrators may want to view all articles that are marked as drafts or that need reviewed. To view articles by status, simply select he desired status, such as Drafts, Review or Stale, from the navigation pane. All articles with the selected status will load in the content pane.

Viewing Articles by Brand

To view articles by brand, select the Brand dropdown above the navigation pane and select the desired brand. All articles assigned to the selected brand will load in the content pane.

Viewing Deleted Articles

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

Deleting Knowledge Base Articles

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

To delete a knowledge base article, simply select the desired article(s) in the content pane. Then use the Actions (...) icon in the content pane toolbar and select Delete from the dropdown menu. Alternatively, agents can delete an article they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a knowledge base article they are presented with a confirmation dialog. In addition to confirming the deletion of the article, there is an option to forward traffic (e.g., search engine traffic or bookmarks) to a new/different article. For example, if a new article was written that covers all, or even some, of the information contained in the article marked for deletion. To redirect traffic, simply select the folder, then the article, you want use.

Once an article is deleted, it is no longer available for review or action and will eventually be purged from the system. (Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.)

Searching Knowledge Base Articles

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

Basic Search

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

Advanced Search

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

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

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by folder, select the appropriate folder from the list. To search in sub-folders, select that option.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Flags - To search by article status (drafts, private, etc.), select the appropriate status from the list.
- Items to Include - It's possible to search all available articles OR to search just in articles that have been deleted.
- Creation Date - To search by article creation date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Date Modified - To search by a date range during which articles were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Moderating Knowledge Base Feedback

Knowledge base feedback can be a useful tool for companies that want to promote community on their portal and gather feedback on the content of an article. Article feedback

can include helpful tips, questions about steps outlined in an article, suggestions for improving articles and more.

To eliminate spammy feedback left on articles, administrators may choose to moderate a user's feedback prior to it being published to the article. When moderation of feedback is enabled and a portal visitor leaves feedback on an article, their feedback is not immediately visible to the public. Until a moderator approves it, the comment is only visible to the user who created it. If this setting is enabled in a brand's Permissions settings , agents and administrators can review feedback left on articles and even reply to the user or delete the comment.

Knowledge base moderation can take place in the management interface or at the portal. To view unapproved feedback, click on the Knowledge Base icon . Then click on Moderation in the navigation pane. A list of articles with unapproved feedback will load in the content pane.

To moderate user feedback, select Moderation in the navigation pane. Any article that has feedback requiring moderation will appear in the content pane. Select the article from the list, then click the Feedback tab on the article itself. The feedback will display in the preview pane. Clicking on the Actions icon within the feedback itself offers the following options:

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

Reviewing Feedback Flagged as Abusive

When a portal visitor flags customer feedback as abusive, that feedback is no longer visible to the portal visitor. To view abusive feedback, click the knowledge base icon , expand Moderation in the navigation pane and click on the Abuse tab. A list of feedback flagged as

abusive will display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve, edit or block customer feedback flagged as abusive.

Viewing Blocked Feedback

When a moderator blocks feedback, it is no longer visible to anyone in the portal. However, moderators can view any blocked feedback by clicking the knowledge base icon , expanding Moderation in the navigation pane and clicking on the Blocked tab. A list of blocked feedback will display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve or edit feedback that is blocked.

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

Canned Replies

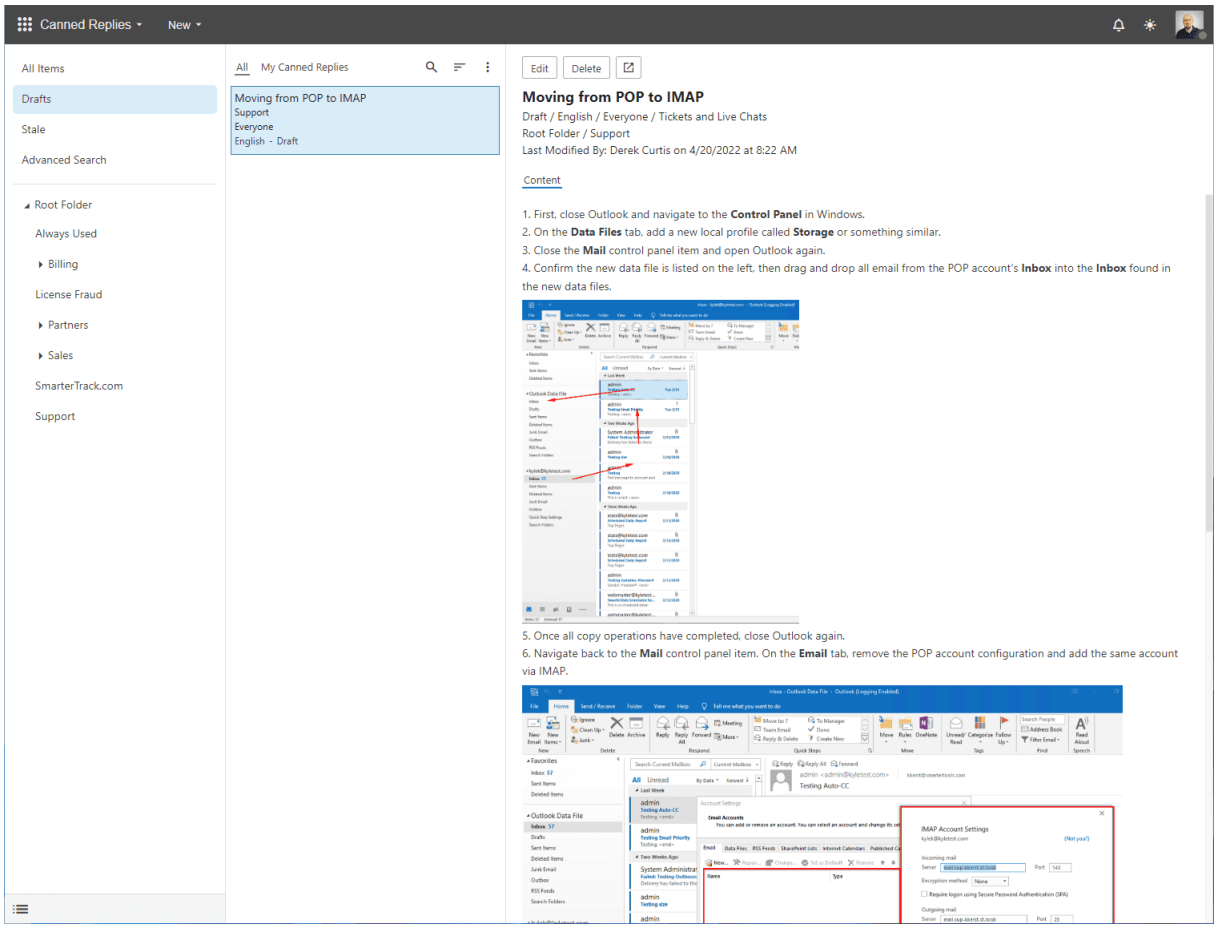
Canned Replies Overview

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

However, canned replies don't have to be used for issues. They can also be used for relaying consistent messaging about a new product release, about new features that have been added to a product or service, or even efficiently answering common questions about things like store hours, how long a promotion lasts, sales information, and much more.

To access canned replies, log into the management interface with your agent account. Then select Canned Replies from the Navigator. All of the canned replies in the root folder that are assigned to a department you belong to will load in the content pane. To view the canned replies that are assigned to just your agent account, click the My Canned Replies tab in the

content pane. Canned replies that are assigned to a specific agent are only available to that agent. For example, agents may create their own canned replies for issues they normally see on a day-to-day basis. They can then use those canned replies to quickly reply back to a customer. Canned replies that are assigned to "Everyone" can be used by every agent.



Navigating Canned Replies

In general, the following details are available for each canned reply in the content pane:

- Title - The title of the canned reply.
- Assigned To - The agent or department to which the canned reply is assigned. This determines which agents or departments have access to the canned reply.
- Language - The language assigned to the canned reply.
- Flags - Whether the canned reply is flagged as a draft or not. (NOTE: This line appears next to the Language, not as a separate line.)

Performing Canned Reply Actions

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

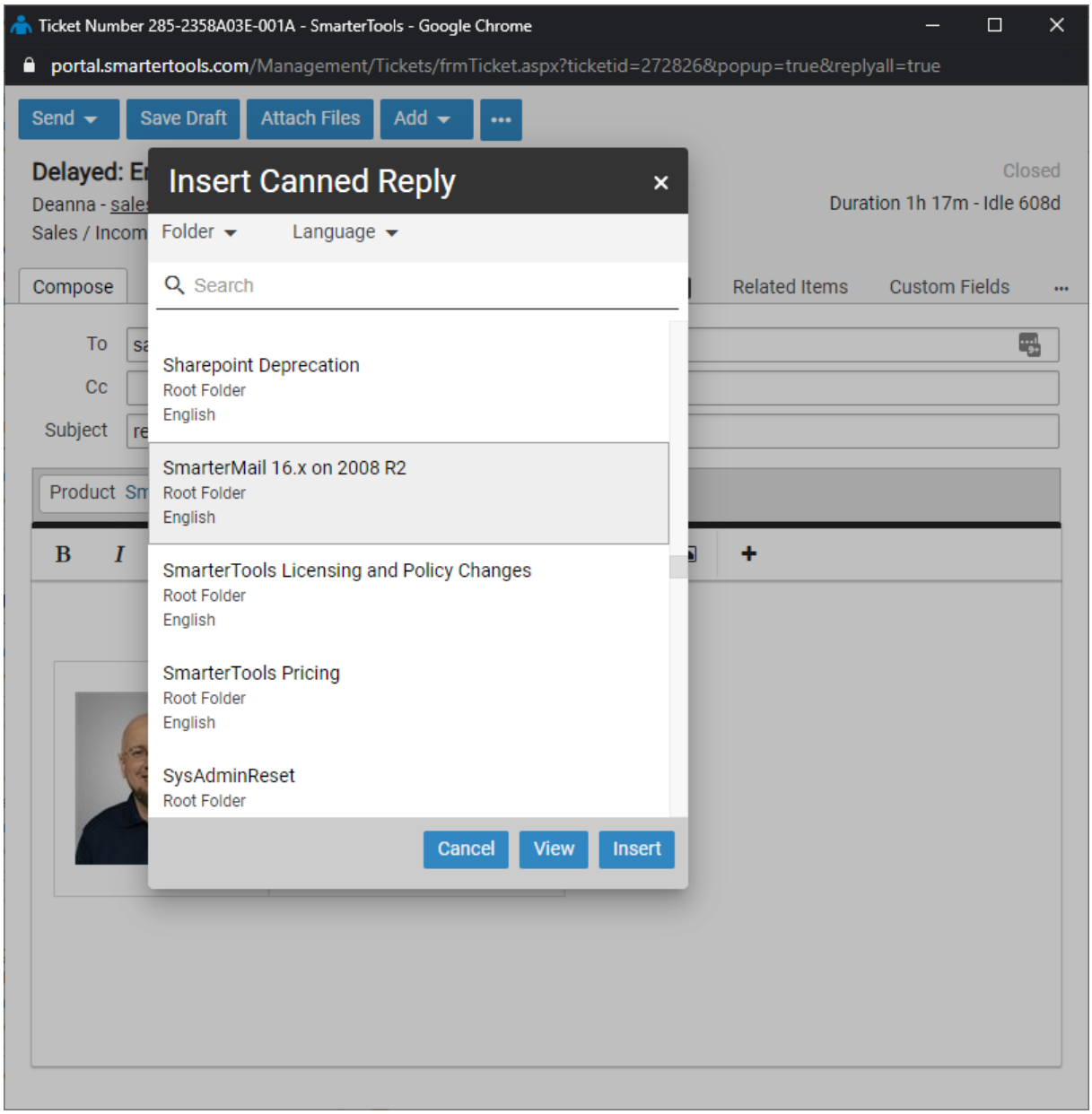
• Search - Allows you to perform a basic search on the items listed in the content pane.
• Sort - Sorts the list of replies in ascending or descending order based on the selected option, such as subject, type, status, etc. Clicking on Reset Sort Order will return the sort order to its default status.
• Actions (...) - Click this button and select the appropriate option to select all canned replies, move canned replies, copy canned replies or change the status of canned replies.

• Select All - Selects all canned replies in the content pane.
• Mark - Click this button and select the appropriate option to change the status of (or "flag") the selected canned reply(s).
• Public - Marks the canned reply as public. Public canned replies are visible to administrators and agents.
• Draft - Marks the article as a draft. Drafts are only visible to administrators and agents.

• Move - Moves the selected canned reply(s) to another folder.
• Copy - Copies the selected canned reply(s) to another folder.
• Delete - Deletes the selected knowledge base articles. For more information, see Deleting Canned Replies .

Using Canned Replies

As mentioned, canned replies can be inserted into ticket replies as well as during a live chat. Regardless of where you use canned replies, they're inserted into replies the same way:



• When in a live chat or replying to a ticket, click the Actions (...) menu.

• From the dropdown menu, click Insert Canned Reply . This will load the Canned Replies modal window which lists the available canned replies you can use.

• Click on the Title of the canned reply you want and its contents will load. To insert it into your chat, simply click the Insert button. (Alternatively, you can double-click the desired canned reply and it will be pasted into your messages text box.)

• If need be, you also have the ability to edit the canned reply prior to inserting it into your live chat.

• Once the reply has been added, you can add to it or simply send it along as your response.

Creating New Canned Replies

To create a new canned reply, select New in the Navigator, then select Canned Reply from the dropdown. The new canned reply window opens that the agent will use to create the canned reply.

The new canned reply window contains a tab to compose the reply, and a tab to set reply options such as the default language to use and whether the reply should be available for live chats and/or tickets.

Compose Tab

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

- Title - Type the title of the canned reply in this field.
- Folder - To specify the folder in which this canned reply should appear, select the appropriate folder from the list.
- Assign To - If you want a canned reply to ONLY be available to specific agent, or to a specific department, then select your choice from this drop down. If the canned reply should be available to everyone, that can be set as well.
- Flags - In order to flag the canned reply as a draft, check the appropriate box. For more information, see Canned Replies Overview
- WYSIWYG Editor - This is where the article is created.

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

Options Tab

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

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

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

- Save - Saves the contents of the canned reply.

Managing Canned Reply Folders

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

Creating Canned Reply Folders

To add a new folder, click the menu icon at the bottom of the navigation pane and click Add Folder This will open a new folder window with the following fields:

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

Click Save .

Moving Canned Replies to Another Folder

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

Renaming and Deleting Folders

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

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

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

Viewing Canned Replies

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

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

- Save - Edits the selected canned reply.
- Delete - Deletes the selected canned reply. For more information, see Deleting Canned Replies .

Tabs within a Canned Reply

Canned reply information is organized within the following tabs:

- Compose - The text of the knowledge base article.
- Options - This tab includes the language used for the reply as well as where the reply can be used within SmarterTrack.

Deleting Canned Replies

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

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

Searching Canned Replies

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

Basic Search

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

Advanced Search

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

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

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by root folder, select the appropriate folder from the list.
- Assigned To - To search by the agent or department to which the canned reply is assigned, select the appropriate option from the list.
- Flags - To search by flag, select the appropriate status from the list. Included Deleted Items - Check this to include items that conform to other settings but that have been deleted.
- Creation Date - To search by the creation date of the canned reply, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by a date range during which canned replies were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.

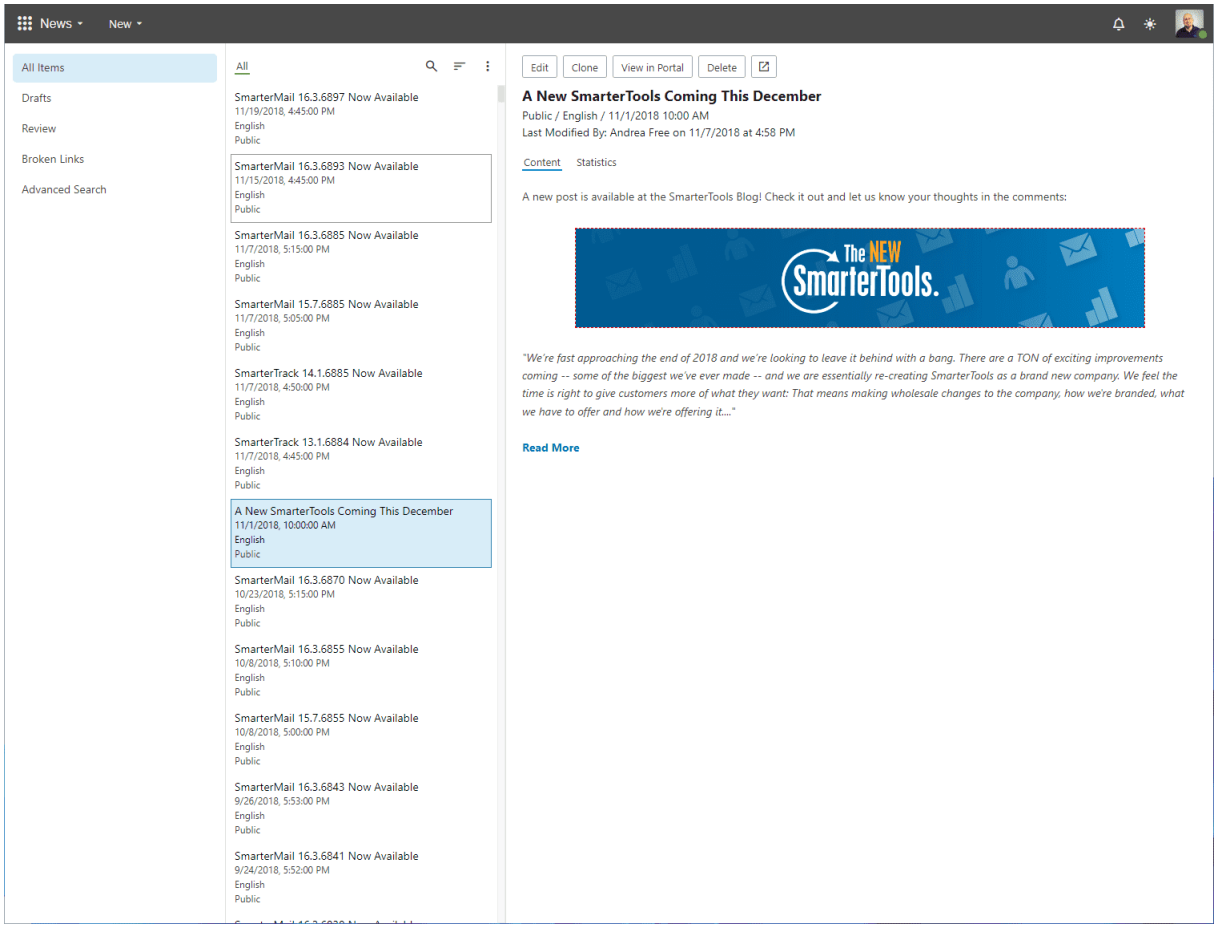
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

News

News Overview

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

To access news items, log into SmarterTrack as an agent and select News from the Navigator. All of the news items in the system will load in the content pane.



Navigating News

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

- Title - The title of the news item.
- Date - The date and time the news item was created.
- Language - The language for the news item.
- Flags - The status of the news item (private, public, draft, etc.).

Performing News Actions

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

- Search - Allows you to perform a basic search on the items listed in the content pane.
- Sort - Sorts the list of items in ascending or descending order based on the selected option, such as subject, status, etc. Clicking on Reset Sort Order will return the sort order to its default status.
- Actions (...) - Click this button and select the appropriate option to select all news items change the status of news items.
- Select All - Selects all news items in the content pane.
- Mark - Click this button and select the appropriate option to change the status of the selected news item(s).
- Public - Marks the news item as public. Public news items are visible to everyone.
- Private - Marks the news item as private. Private news items are only visible to administrators and agents.
- Draft - Marks the news item as a draft. Drafts are only visible to administrators and agents.
- Reviewed - Marks the news item as reviewed. Agents typically use this option to indicate that a news item has been reviewed/modified after another agent has flagged it for review.
- Review - Flags the news item for review. Agents typically flag a news item for review when they want it edited for content, clarity, or grammatical errors.
- Rescan for Broken Links - Scans all news items to check for broken internal and external links.
- Delete - Deletes the selected news items. For more information, see Deleting News Items .

Creating News Items

To create a new news item article, click New in the Navigator and then select News Item from the dropdown. A new news item window will open that the agent will use to create the article.

The following fields will appear in the news item compose tab:

- Title - Type the title of the news item in this field.
- Date - The date the news item was created.
- Summary - Type a brief summary of the news item in this field. This summary text is automatically used to generate an SEO meta description tag for the article. This tag is an HTML attribute that provides a concise summary of the web page. These descriptions commonly appear underneath the blue clickable links in a search engine results page (SERP). Note: While there is a 256-character limit to news item summaries, we recommend keeping the summary under 160 characters, as search engines generally truncate snippets longer than 160 characters.
- Flags - To specify the status of the news item, select the appropriate checkbox(es). For more information, see News Overview
- WYSIWYG Editor - The what-you-see-is-what-you-get (WYSIWYG) editor where the article is created.

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

In addition to the Compose tab, the following tabs are available in the new article window:

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

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

Note: Canonical tags are auto-generated for each News Item to help boost SEO strategies.

Viewing News Items

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

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

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

- Edit - Edits the selected news item.
- Clone - Creates a duplicate of the news item with the same Brand and Language settings pre-configured.
- View in Portal - Loads the selected news item in the portal. Viewing the news item in the portal allows agents to see the layout of the news iem as portal visitors will see it.
- Delete - Deletes the selected news item. For more information, see Deleting News Items .

Tabs within a News Item

News item information is organized within the following tabs:

- Compose - The text of the news item. Agents and managers can edit news items from this tab.
- Brands - This tab highlights brand portal where the news item should appear.
- Language - This tab highlights the language options available for the news item.
- Statistics - Displays the number of unique views and hits a news item receives.

Viewing News Items by Flag

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

Viewing News Items by Broken Links

Occasionally, agents and administrators may want to view all news items that contain broken internal or external links. By default, SmarterTrack automatically and periodically scans news items to ensure that any URLs are still valid. To view news items that contain broken links, simply select Broken Links in the navigation pane. All news items with the selected status will load in the content pane.

Deleting News Items

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

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

Searching News Items

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

Basic Search

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

Advanced Search

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

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

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Flags - To search by flag (drafts, flagged, etc.), select the appropriate flag from the list.

- Date Range - To search by a date range during which news was published, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Reports

Reports Overview

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

Report Options

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

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

The following options allow the individual viewing a report to modify how data is presented. Some reports may offer all of these options while others may offer a smaller set of options based on the type of data returned.

- Date Range - Allows an agent to select a custom date range for each report.
- Chart - Allows an agent to select the type of chart that represents the data presented.
- Sort - Changes the sort order of the data presented and presents which column to use for the sort.
- Group By - Selects how the data is grouped together in the report. Examples include by hour, by week or by day.
- Filter - Filters can be applied to help narrow down how data is presented in a report. For example, for trend reports agents can filter data based on department, group or agent. Summary reports can be filtered at an even more granular level.
- Rows - Most reports offer a Rows selector. This is to specify how many rows of data to return for that report. SmarterTrack reports will only return the number of rows you specify, and does not use pagination or any other method to "hide" or over-return results. This is done for a couple of reasons: 1) Returning ALL information that falls within a specific timeframe could take an inordinate amount of time for the information to be displayed, especially for larger installations, and 2) pagination can't be reflected in email reports. Since almost all reports can be emailed to others outside of SmarterTrack, the format for the reports needs to be taken into account for that emailed report.

Custom Reports

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

Summary and Trend Reports

SmarterTrack includes more than 70 predefined summary and trend reports:

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

Survey Results

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

Custom Reports Overview

This feature is only available to administrators using SmarterTrack Enterprise.

A Custom Report allows you to combine bits and pieces of different standard reports into a single report that details just the information you want to display. This makes it easier to get the proper information to the right people within an Organization. Once a Custom Report is created, it's available in the Custom Reports area and can be viewed, and used, just like any standard report: it can be exported or emailed to whoever requires the information.

Manage Custom Reports

Clicking on this area displays any existing Custom Reports in the content pane. Here, you can select one and edit its settings or delete it entirely. You also create new Custom Reports from this area.

Scheduled Email Reports

Clicking on this area displays any Custom Reports that have been scheduled to be sent daily, weekly or monthly. If a report has been set up to send daily, it's also possible to pause the sending of that report by simply disabling it. This prevents you from having to delete the schedule and then create it at a later time once you're ready to start sending it again. It's also possible to send a Custom Report outside its standard schedule with the Send Now button. NOTE: Scheduled Email Reports send out at 2:00 a.m. at the time set up on the SmarterTrack server and are sent from the default Brand's SMTP account.

Creating Custom Reports

Follow these steps to create a custom report:

- Log in to the SmarterTrack management interface as a System Administrator.
- Click on the Reports icon.
- Click Manage Custom Reports in the navigation pane.
- Click the New button in the content pane toolbar.
- In the Custom Report tab, type the Name of the report and select the Default Date Range of the data for which the report covers.
- Click the Report Items tab.
- Click the Add Item button from the content pane toolbar.
- To specify the report items that you want to include in this custom report, select the appropriate report items from the list.
- Click the OK button .
- To add more report items, repeat steps 7-9 until complete.
- Once your new Custom Report is configured, click the Save button .

Summary Reports

Audit Reports

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

- Abandoned Chats - Shows details about live chats that were started but an agent failed to respond. Abandoned chats are closed by the end user without any interaction from an agent.
- Agent-Group Activity - Shows up-to-date information on every agent's activity level by their group and by function. For example, when agents initially log in to tickets and/or live chats, when they go unavailable, when they log out and more. As the information is updated essentially "on the fly", using this report and continually generating it is a good way to stay on top of what agents are doing, when they're going away from their keyboards and more.
- Agent Web Sessions - Shows the Web sessions for a single agent or multiple agents during a set time period. A "session" is logged every time an agent accesses a page. However, in order for a time to be logged for the session, an action needs to occur: a postback to the page is initiated or an agent navigates to a new page. Therefore, if there are several 0m 0s sessions, that means the agent accessed a page but didn't take any action on it. Regardless, this report is useful for monitoring the activity of staff. Note: Sessions within three minutes of one another are joined and considered the same session for reporting purposes.
- Call Time Logs - When time logs are added to call logs, this report shows the amount of time agents spent working with customers via phone calls. Note: Only calls with time logs are included in this report.
- Chat Time Logs - When time logs are added to live chats, this report shows the amount of time agents spent working with customers via live chat. Note: Only chats with time logs are included in this report.
- Coverage Time - Shows the number of hours and minutes that are covered by at least one active agent for each department or group during a set time period. Chat and ticket coverage are reported separately because agents can become active in those

areas separately. This report can be grouped by employee as well, for greater detail.

• Deletions - Shows the number of deleted tickets and/or live chats currently in the system. Deleted items can be accessed via Advanced Search for both tickets and chats. Note: Purged items are not included in this report. SmarterTrack automatically purges deleted items after 30 days.

• Ticket Time Logs - When time logs are added to tickets, this report shows the amount of time agents spent working with customers via tickets. Note: Only tickets with time logs are included in this report.

• Transfers - Shows details about tickets and/or live chats that were transferred in to, or out of, various departments/groups. It is also possible to group this report by Employee, so managers can see which agents are transferring the most tickets.

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

• Agent - The specific agent.

• Billable - Indicates whether the time log hours (for tickets, chats or calls) are considered billable hours.

• Category - The master category that the time log is assigned to.

• Live Chat Coverage Percent - The percentage of business hours that a department's live chat is covered by at least one active agent.

• Live Chat Coverage Time - The total amount of time live chats are available.

• Chat Number - The identifier for the live chat.

• Department - The specific department.

• Date - The time frame during which the event occurs.

• Duration - The length of time a specific thing took. (E.g., a logged phone call.)

• Elapsed Time - The total amount of time the agent was logged into SmarterTrack.

• Email Address - The customer's email address.

• Event - What occurred to cause the log creation.

• Group - The specific group.

• Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.

• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.

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

Call Reports

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

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

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

- Agent - The specific agent.
- Average Session Length - The average length of the calls in minutes.
- Department - The specific department.
- Group - The specific group.
- Total Calls - The total number of calls that occurred during the time frame.
- Total Incoming Calls - The total number of incoming calls that occurred during the time frame.
- Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

Canned Reply Reports

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

- Contribution - Shows the number of canned replies an agent has created, edited, review, flagged, deleted, or inserted into tickets during a set time period. This report is useful for identifying how much or how little an agent uses canned replies in ticket responses and summarizes each agent's contribution towards the contents of the canned reply system.
- Popularity - Shows the number of times a specific canned reply was used and the number of it was used in a ticket or a live chat, during a set time period. This report is useful for detecting which canned replies are frequently used and which canned replies should be phased out.

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

- Agent - The specific agent.
- Agents Using Reply - The number of agents that used a particular canned reply.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the canned reply.
- Replies Added - The number of canned replies added to the system.
- Replies Deleted - The number of canned replies deleted from the system.
- Replies Edited - The number of canned replies edited in the system.
- Replies Flagged - The number of canned replies flagged for review in the system.

- Replies Inserted into Tickets/Chats - The number of distinct canned replies inserted into ticket responses or into active chat.
- Replies Reviewed - The number of distinct canned replies reviewed by agents.
- Subject - The name of the canned reply.
- Times Used - The total number of times a specific canned reply was inserted into a ticket and/or a live chat.

Community Reports

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

- Employee Activity Overview - Shows the number of Community posts, Threads and answers given by employees during a set time period.
- User Activity Overview - Shows the number of Community posts, Threads and answers given by Users during a set time period.

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

- # - The "rank" of the specific Employee or User.
- Employee/User - The name of the Employee or User.
- Thread Posts - The number of Thread Posts created, either by Employees or Users.
- Threads Created - The number of new Threads created, either by Employees or Users.
- Posts Marked as Answer - The number of posts that were marked as the Answer to a question, either by Employees or Users.

Cost Analysis Reports

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

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

assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available:

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

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

- Agent - The specific agent.
- Call Time Cost - The total number of minutes charged for calls as per the estimates the administrator set in the group's settings.
- Department - The specific department.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Chat Costs - The total estimated costs for vs as per the live chat estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the administrator set in the group's settings and the agents' hourly rates.
- Group - The specific group.
- Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department. NOTE : This report may show 0 when using the Group By: Group setting, even though the Trend report shows chat transfers. This is

because you can only transfer chats between Agents, NOT Groups. Changing the Group By to Employees will display the proper number of chat transfers.

• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.

• Live Chat Time Cost - The total number of minutes charged for live chats as per the estimates the administrator set in the group's settings.

• Messages Received - The total number of live chat or ticket messages received from customers.

• Messages Sent - The total number of live chat or ticket messages sent by agents.

• Ticket Time Cost - The total number of minutes charged for tickets as per the estimates the administrator set in the group's settings.

• Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.

• Total Calls - The total number of call logs that occurred during the time frame.

• Total Chats - The total number of live chat sessions that occurred during the time frame.

• Total Estimated Cost - The total cost of all support types: tickets, calls, and chats.

• Total New Tickets - The total number of tickets created during the time frame.

• Total Time - The total number of minutes that agents were on calls during the time frame.

Knowledge Base Reports

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

• Contribution - Shows the number of Knowledge Base articles an agent has created, edited, reviewed, flagged, or deleted during a set time period.

• Popularity - Shows the most viewed Knowledge Base articles by hits and visitors during a set time period. This report is useful for detecting which KB articles are frequently accessed and which KB articles need to be phased out.

• Searches - Shows the Knowledge Base searches made by portal visitors during a set time period. This report is useful for identifying what visitors to your site are searching

for and for evaluating the performance of search strings.

• Searches Without Results - Shows the Knowledge Base searches made by portal visitors that did not return any search results during a set time period. This report is useful because it helps determine which KB articles should be added or which terms should be added to existing articles.

• Searches Without Views - Shows the Knowledge Base searches made by portal visitors that did not result in article views during a set time period.

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

• % Finding - The percentage of searches that ended up having a result viewed by an end user.

• Agent - The specific agent.

• Articles Added - The number of knowledge base articles added to the system.

• Articles Deleted - The number of knowledge base articles deleted from the system.

• Articles Edited - The number of knowledge base articles edited in the system.

• Articles Flagged - The number of knowledge base articles flagged for review in the system.

• Articles Reviewed - The number of distinct knowledge base articles reviewed by agents.

• Avg Articles Viewed - The average number of articles a portal visitor viewed after conducting a search.

• Avg Result Count - The average number of relevant articles displayed in search results.

• Date - The time frame during which the event occurs.

• Event - The event that pertains to the knowledge base article.

• Hits - The number of times a particular knowledge base article was viewed.

• Search String - The keywords queried by the portal visitor.

• Searches - The number of times a search was conducted for a particular keyword or term.

• Spider Visits - The number of unique search engine spiders that crawled a particular knowledge base article.

• Subject - The title of the knowledge base article.

• User Visits - The number of unique portal visitors that viewed a particular knowledge base article.
• Total Visits - The number of actual visits a particular knowledge base article received.
• Visitors Searching - The number of portal visitors that searched for a particular keyword or term.

Live Chat Reports

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

• Overview - Shows an overall view of the organization's live chat usage during a set time period. The report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
• Incoming Messages - Shows the details of live chat sessions that are initiated by users, either from the portal or from external websites when live chat integration is used, during a set time period. This report is useful because it helps to identify the average load of chat sessions and areas to increase or decrease message targets. Note: This report only applies to live chat initiated by customers.
• Incoming Response Times - Shows the amount of time customers waited for a live chat response from agents during a set time period. This report is useful because it helps to identify problem areas where agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
• Incoming Abandonment - Shows the abandonment rate for incoming live chats during a set time period. This report can be used to locate the areas in which more agents may be required or max chat settings may need adjusted to meet demand.
• Outgoing Messages - Shows the details of live chat sessions that are initiated by agents. These are generally chat sessions that are started with users via an Event, or manually initiated from within Who's On.
• Outgoing Response Times - Shows the amount of time customers wait for a live chat response from agents during a set time period. Note: This report only applies to live chats initiated by agents.
• Outgoing Performance - Shows the total number of live chat invitations sent, ignored,

accepted, and rejected for a specific department, group, or agent during a set time period. Note: This report only applies to live chats initiated by agents.

• Outgoing Results - Shows the results of live chat invitations initiated by agents.

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

• Accepted Chats With Response - The total number of live chat invitations to which customers accepted and responded.

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

• Agent - The specific agent.

• Agents Using Reply - The number of agents that used a particular canned reply.

• Average Abandoned Session Length - The average amount of time an end user waited before abandoning their chat, regardless of whether it was assigned or not.

• Average Initial Response Time - The average number of seconds before the agent replies to the initial message from the customer.

• Average Longest Response Time - The average longest response time of all live chat sessions.

• Average Messages Received Per Chat - The average number of messages received during a live chat session.

• Average Messages Sent Per Chat - The average number of messages sent during a live chat session.

• Average Response Time - The average amount of time before an agent replied to a live chat message.

• Average Session Length - The average amount of time that a customer spent in a live chat.

• Average Time in Queue - The average amount of time that a customer spent waiting for a chat to be assigned to, or taken by, an agent.

• Department - The specific department.

• Group - The specific group.

• Chat Messages Received - The total number of messages received from customers.

• Chat Messages Sent - The total number of messages sent by agents.

• Live Chats Abandoned After Assigned - The total number of live chats that were

abandoned by an end user after their chat was assigned to, or taken by, an agent.

• Time in Queue - The amount of time the live chat was in the queue before it was transferred to an agent.

• Total Abandoned Live Chats - The total number of live chats that were abandoned by an end user prior to it being assigned to, or taken by, an agent.

• Total Accepted Chats - The total number of live chat invitations accepted by customers.

• Total Chats - The total number of live chat sessions that occurred during the time frame.

• Total Incoming Chats - The total number of live chats initiated by an end user.

• Total Invited Chats - The total number of live chat invitations sent to customers through Who's On.

• Total Invites Ignored - The total number of live chat invitations ignored by customers.

• Total Outgoing Chats - The total number of live chat invitations sent by agents through Who's On.

• Total Rejected Chats - The total number of live chat invitations rejected by customers.

News Reports

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

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

• Popularity - Shows the most viewed news items by hits and visitors during a set time period. This report is useful for detecting which news items are popular.

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

• Agent - The specific agent.

• News Date - The time frame during which the event occurs.

• News Added - The number of news items added to the system.

• News Deleted - The number of news items deleted from the system.

• News Edited - The number of news items edited in the system.

• News Flagged - The number of news items flagged for review in the system.

- News Reviewed - The number of distinct news items reviewed by agents.
- Average News Items Viewed - The average number of news items a portal visitor viewed after conducting a search.
- News Date - The date the news item was published.
- Spider Visits - The number of unique search engine spiders that crawled a particular news item.
- Subject - The title of the news item.
- Total Visits - The total number of portal visitors that viewed a particular news item.
- User Visits - The number of unique portal visitors that viewed a particular news item.

Survey Results

To access survey reports, click the reports icon . Then expand the Summary Reports and Survey Reports folders. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission.

The following survey reports are available:

- Conversion Rate - Shows the number of surveys completed by customers compared to the number of surveys offered by agents during a set time period.
- Performance - Shows the average rating of each survey.
- Answers - Shows the aggregate number of times a specific question was answered, given the question type. For example, a question with a valued range of answers (e.g., 1 - 10, 1 being good, 10 being amazing) show each answer and the number of times that answer was give. For short answer questions, each is listed separately with the answer given.

Survey results are a bit unique compared to other reports as the results can be broken out by Brand, by Agent or by the individual survey offered. For more information, see Survey Results .

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

• Agent - The agent about whom the survey was completed.
• Answer Count - The total number of times a particular answer was give. This number will be larger for specific question types, such as simply yes/no questions.
• Average Rating - The average overall score that the survey received.
• Completion Date - The date the survey was completed by the end user.
• Conversion Rate - The percentage of surveys offered that were completed by customers.
• Given Answer - The text of the answer to the question asked.
• Question - The text of the actual question asked on the given survey.
• Rating - The overall score of the survey.
• Related Item - The ticket number or live chat number that initiated the survey response.
• Survey Name - The name of the survey offered.
• Surveys Answered - The number of surveys completed by customers.
• Surveys Offered - The number of surveys offered to customers.

Ticket Reports

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

• Overview - Shows an overall view of the organization's ticket sources during a set time period. This report is useful because it shows the source of tickets for each department, which can help managers analyze department loads.
• New Ticket Sources - Shows the methods customers used to submit tickets during a set time period.
• Re-opened Ticket Sources - Shows the number of re-opened tickets by roles for a specific department during a set time period.
• Statuses - Shows an overall view of the organizations ticket workload by status during a set time period. This report is useful in helping managers rebalance teams and change ticket weights effectively.
• Response Times - Shows the amount of time customers waited for a ticket response from agents during a set time period. Note: Low response times should always be a

goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.

• Handling - Shows the overall activity of tickets by department, group, or agent during a set time period. This report focuses on the internal workload generated by tickets and time required to actually resolve the issue.

• Workload - Shows the ticket workload by department, group, or agent. This report can be used to quickly identify how each team or agent is performing relative to others and to identify potential staffing changes.

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

• Agent - The specific agent.

• Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.

• Average Messages Received Per Ticket - The average number of messages received before a ticket issue is resolved.

• Average Messages Sent Per Ticket - The average number of messages sent by agents before a ticket issue is resolved.

• Average Response Time - The average amount of time before an agent replied to a ticket.

• Average Time To Close - The average amount of time a closed ticket was in active status.

• Average Time Open and Active - The average amount of time a ticket was in an active status and, therefore, actively being worked on.

• Group - The specific group.

• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.

• Messages Received - The total number of messages received from customers.

• Messages Sent - The total number of messages sent by agents.

• New Tickets By Agents - The total number of tickets created by agents.

• New Tickets Received By Email - The total number of tickets submitted by customers via email.

• New Tickets By Web Interface - The total number of tickets submitted by customers

via the portal.

• Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.

• Re-opened Tickets By Agents - The total number of tickets re-opened by agents.

• Re-opened Tickets By Users - The total number of tickets re-opened by users.

• Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.

• Total Closed Tickets - The total number of closed tickets.

• Total Modified Tickets - The total number of tickets that were changed in some way. For example, had their priority or status changed, had a comment added, etc. Basically, any change to a ticket other that it being replied to.

• Total New Tickets - The total number of tickets created during the time frame.

• Total Open Tickets - The total number of active tickets.

• Total Re-opened Tickets - The total number of tickets that were re-opened during the time frame.

• Total Tickets Locked - The total number of tickets that were closed and locked (cannot be re-opened) during the time frame.

• Total Tickets Replied To - The total number of distinct tickets replied to, regardless of how those replies were sent. For example, replies sent via an Event, from the agent, via the API, etc.

Time Log Reports

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

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

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

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

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

- Total Billable Time Logged - The total amount of billable time logged during the time frame.
- Total Billable Time Logs - The total number of billable time logs that occured during the time frame for live chats, calls, or tickets.
- Total New Billable Time Logs - The total number of billable time logs created during the time frame.
- Total New Time Logs - The total number of new time logs created during the time frame.
- Total Time Logged - The total amount of billable time that occured during the time frame.

Trend Reports

Call Trend Reports

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

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

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

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

Canned Reply Reports

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

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

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

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

- Times Used - The number of times agents used canned replies.
- Replies Inserted into Tickets - The number of canned replies inserted into ticket responses.

Community Reports

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Employee Activity Trend - Shows the number of Community posts, Threads and answers given by employees during a set time period.
- User Activity Trend - Shows the number of Community posts, Threads and answers given by Users during a set time period.

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

- Day - The day of the week within the report's timeframe.
- Thread Posts - The number of Thread Posts created, either by Employees or Users.
- Threads Created - The number of new Threads created, either by Employees or Users.
- Posts Marked as Answer - The number of posts that were marked as the Answer to a question, either by Employees or Users.

Cost Analysis Trend Reports

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

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

assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

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

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

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

- Day - The day of the week within the report's timeframe.
- Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Live Chat Costs - The total estimated costs for live chats as per the live chat estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Total Costs - The total estimated costs of tickets, calls, and live chats per

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

• Total New Tickets - The total number of tickets created during the time frame.

• Messages Sent - The total number of outgoing messages for that date.

• Messages Received - The total number of incoming messages for that date.

• Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.

• Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the administrator set in the group's settings.

• Estimated Ticket Costs - The total estimated costs based on Ticket Time Cost and the hourly rate assigned to agents.

• Total Live Chats - The total number of live chat sessions that occurred during the time frame.

• Live Chat Messages Sent - The total number of outgoing live chat messages.

• Live Chat Messages Received - The total number of incoming live chat messages.

• Incoming Live Chat Transfers - The total number of live chats transferred to a specific department from another department.

• Live Chat Time Cost - The total number of minutes charged for live chat as per the formulas set in group configuration.

• Estimated Live Chat Costs - The total estimated costs based on Live Chat Time Cost and the hourly rate assigned to agents.

• Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.

• Total Calls - The total number of call logs that occurred during the time frame.

• Call Time Cost - The total number of minutes charged for calls as per the formulas set in group configuration.

• Estimated Call Costs - The total estimated costs based on Call Time Cost and the hourly rate assigned to agents.

Knowledge Base Trend Reports

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

Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Contribution Trend - Shows the number of Knowledge Base articles created, edited, reviewed, flagged, or deleted over time.
- Popularity Trend - Shows the most viewed Knowledge Base articles by hits and visitors over time.
- Searches Trend - Shows the Knowledge Base searches made by portal visitors over time. This report is useful because it helps managers gauge whether their Knowledge Base is becoming more or less effective over time.

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

- Articles Added - The number of Knowledge Base articles added to the system.
- Articles Edited - The number of Knowledge Base articles edited in the system.
- Articles Flagged - The number of Knowledge Base articles flagged for review in the system.
- Articles Reviewed - The number of distinct Knowledge Base articles reviewed by agents.
- Articles Deleted - The number of Knowledge Base articles deleted from the system.
- Visitors - The number of unique portal visitors that viewed a particular Knowledge Base article.
- Visitors Searching - The number of portal visitors that searched for a particular keyword or term.
- Searches - The total number of searches performed.
- Average Result Count - The average number of results returned per search.
- Average Articles Viewed - The average number of search results that were viewed per search.

• Searches Resulting in Views - Of the Searches performed, the total number that actually returned a result that was viewed by the person performing the search.
• Percent Finding - The percentage of searches that produced viewable results. This is essentially the number of Searches Resulting in Views divided by Searches.

Live Chat Trend Reports

To access live chat reports, click the reports icon . Then expand Trend Reports and then Live Chat. The following live chat reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

• Overview Trend - Shows an overall view of the organization's live chat usage over time. This report is useful because it provides managers with an at-a-glance view of the company and can help identify areas to investigate with more detailed reports.
• Incoming Messages Trend - Shows the details of incoming messages of live chat sessions over time. This report is useful because it can identify if chat sessions are getting more or less chatty over time. Note: This report only applies to live chat initiated by customers.
• Incoming Response Times Trend - Shows the amount of time customers waited for a live chat response from agents over time. This report is useful because it can help managers identify problem areas in which agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
• Incoming Abandonment Trend - Shows the relationship between wait time in the queue and abandonment rates over time. This report is useful in forecasting when more agents may be needed or when max chat settings need to be adjusted to meet demand.
• Outgoing Messages Trend - Shows the details of outgoing messages of live chat sessions over time. Note: This report only applies to live chats initiated by agents.

- Outgoing Response Times Trend - Shows the amount of time customers wait for a live chat response from agents over time. Note: This report only applies to live chats initiated by agents.
- Outgoing Performance Trend - Shows the total number of live chat invitations sent, ignored, accepted, and rejected for a specific department, group, or agent over time. Note: This report only applies to live chats initiated by agents.
- Outgoing Results Trend - Shows the results of live chat invitations initiated by agents.

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

- Total Live Chats - The total number of live chat sessions that occurred during the time frame.
- Total Incoming Live Chats - The total number of live initiated from the portal or from chat links on a website.
- Total Outgoing Live Chats - The total number of live chat invitations sent by agents through Who's On.
- Average Time in Queue - The average amount of time a live chat sat in the queue prior to being assigned to, or taken by, an agent.
- Average Session Length - The average amount of time that a customer spent in a live chat.
- Average Response Time - The average amount of time before an agent replied to a live chat message.
- Live Chat Messages Received - The total number of messages received from customers.
- Live Chat Messages Sent - The total number of messages sent by agents.
- Average Messages Received Per Live Chat - The average number of messages received during a live chat session.
- Average Messages Sent Per Live Chat - The average number of messages sent during a live chat session.
- Average Initial Response Time - The average time for a live chat to be initially responded to by an agent.
- Average Longest Response Time - The average longest time for a live chat to be initially responded to by an agent.

• Total Abandoned Live Chats - The total number of live chats that were started by an end user but abandoned prior to being taken by, or assigned to, an agent.
• Live Chats Abandoned After Assigned - The total number of live chats that were started by an end user then abandoned after being taken by, or assigned to, and agent.

• Average Abandoned Sessions Length - The average time for sessions that were abandoned, regardless of being assigned to, or taken by, an agent.
• Total Invited Live Chats - The total number of live chat invitations sent to customers through Who's On.
• Total Accepted Live Chats - The total number of live chat invitations accepted by customers.
• Total Rejected Live Chats - The total number of live chat invitations rejected by customers.
• Total Invites Ignored - The total number of live chat invitations ignored by customers.
• Accepted Live Chats Without Response - The total number of live chat invitations to which customers accepted but did not respond.
• Accepted Live Chats With Response - The total number of live chat invitations to which customers accepted and responded.
• Agent - The specific agent.

News Trend Reports

To access news reports, click the reports icon . Then expand the Trend Reports and News Reports folders. The following news reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

• Contribution Trend - Shows the number of news items created, edited, reviewed,

flagged, or deleted over time.

- Popularity Trend - Shows the most viewed news items by hits and visitors over time.

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

- News Added - The number of news items added to the system.
- News Deleted - The number of news items deleted from the system.
- News Edited - The number of news items edited in the system.
- News Flagged - The number of news items flagged for review in the system.
- News Reviewed - The number of distinct news items reviewed by agents.
- Visitors - The number of unique portal visitors that viewed a particular news item.

Survey Trend Reports

To access survey reports, click the reports icon . Then expand the Trend Reports and Survey Reports folders. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission.

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Conversion Rate Trend - Shows the number of surveys completed by customers compared to the number of surveys offered by agents over time.
- Performance Trend - Shows the average rating of surveys over time.

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

• Average Rating - The average overall score of surveys over time.
• Conversion Rate - The percentage of surveys offered that were completed by customers.
• Surveys Answered - The number of surveys completed by customers.
• Surveys Offered - The number of surveys offered to customers.

Ticket Trend Reports

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

• Overview Trend - Shows an overall view of the organization's Ticket sources over time.

• New Ticket Source Trend - Shows the methods customers used to submit Tickets over time.
• Re-opened Ticket Source Trend - Shows the number of re-opened Tickets by roles for a specific department over time. This report is useful because it shows how the source of re-opened Tickets has changed.
• Status Trend - Shows an overall view of the organizations Ticket workload by status over time. This report is useful because it shows how workload has changed and provides the information needed to rebalance teams, predict trends, or change Ticket weights effectively.
• Response Times Trend - Shows the amount of time customers waited for a Ticket response from agents over time. Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.
• Handling Trend - Shows overall activity of Tickets over time. This report is useful

because is shows the change in internal workload generated by Tickets and the time required to actually resolve the issue.

• Workload Trend - Shows overall Ticket workload over time. This report is useful for identifying potential staffing change needs.

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

• Average Follow-up Response Time - The average amount of time before agents replied to Tickets.

• Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.

• Average Messages Received Per Ticket - The average number of messages received before a Ticket issue is resolved.

• Average Messages Sent Per Ticket - The average number of messages sent by agents before a Ticket issue is resolved.

• Average Response Time - The average amount of time before an agent replied to a Ticket.

• Average Time Open and Active - The average amount of time a Ticket was in active status.

• Average Time to Close - The average amount of time a ticket was open before it was closed.

• Department - The specific department name.

• Group - The specific group name.

• Incoming Ticket Transfers - The total number of Tickets transferred to a specific department from another department.

• Messages Received - The total number of messages received from customers.

• Messages Sent - The total number of messages sent by agents.

• New Tickets By Agents - The total number of Tickets created by agents.

• New Tickets By Web Interface - The total number of Tickets submitted by customers via the portal.

• New Tickets Received By Email - The total number of Tickets submitted by customers via email.

• Outgoing Ticket Transfers - The total number of outgoing Tickets transferred to a

specific department from another department.

• Re-opened Tickets By Agents - The total number of Tickets re-opened by agents.

• Re-opened Tickets By Users - The total number of Tickets re-opened by users.

• Tickets Assigned From Queue - The total number of Tickets that were assigned to an agent after spending time in the queue.

• Total Closed Tickets - The total number of closed Tickets.

• Total Closed Ticket by Customers - The total number of tickets closed by customers.

• Total Modified Tickets - The total number of Tickets that changed status or priority. Note: This includes Tickets that agents replied to regardless of their status in the system.

• Total New Tickets - The total number of Tickets created.

• Total Open Tickets - The total number of active Tickets.

• Total Re-opened Tickets - The total number of Tickets re-opened.

• Total Tickets Auto-closed - The total number of Tickets that automatically closed.

• Total Tickets Locked - The total number of Tickets that were closed and locked.

• Total Tickets Replied To - The total number of distinct tickets replied to, regardless of how those replies were sent. For example, replies sent via an Event, from the agent, via the API, etc.

Time Log Trend Reports

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

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

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

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

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

- Total Billable Time Logged - The total amount of billable time logged.
- Total Billable Time Logs - The total number of billable time logs that occured.
- Total New Billable Call Time Logs - The total number of billable time logs created.
- Total New Time Logs - The total number of new time logs created.
- Total Time Logged - The total amount of billable time that occured.

Survey Results

Survey results are available by clicking the reports icon , expanding Survey Results and clicking the appropriate brand in the navigation pane. Alternately, survey results can be viewed by agent or by specific survey. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission. To view a specific survey result, simply double-click a survey result. The survey questions will load in the content pane and the following columns will be available:

- Question - The text of the survey question.
- Answer - The customer's answer to the survey question.
- Score - The score the agent received on the question. Generally, higher scores indicate better performance.
- Max Score - The highest possible score the agent could receive on the question.
- Weight - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

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

- Actions (...) - Click this button and select the appropriate option to view related items or specific survey results.
- Related Item - Displays the ticket or live chat associated to the selected survey result.
- Results - Displays the survey questions and responses for the selected survey result.

Viewing Survey Results by Brand

To view survey results by brand, click the reports icon , expand Survey Results and click the appropriate brand in the navigation pane. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results By Agent

To view survey results by agent, click the reports icon and expand Survey Results in the navigation pane. Then expand By Agent and select the desired agent. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results by Survey

To view results by survey, click the reports icon and expand Survey Results in the navigation pane. Then expand By Survey in the and select the desired survey. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Missing Answers

When viewing survey responses, especially when those surveys offer long or short answer types, it's possible some questions and their responses may not show up. One possible explanation for this is that the question didn't actually receive a response -- others did, but not that one. Blank answers aren't displayed, nor are their associated questions. So if you see blanks in your survey response reports, this is, most likely, the reason why.

Who's On

Who's On Overview

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

To access this section, log into the management interface with your agent account. Then select Who's On from the Navigator. All visitors currently browsing your website(s) will load in the content pane.

Jump To:

- Performing Actions on Visitors
- Viewing Visitor Details and Activity
- Managing Who's On Filters

Performing Actions on Visitors

The following actions are available from the content pane or preview pane toolbar:

- Search - Allows you to search through the various visitors listed in the content pane.
- Sort - Sorts the list of visitors in ascending or descending order based on the selected option, such as name, browser, current page, etc. Clicking on Reset Sort Order will return the sort order to its default status.

Viewing Visitor Details and Activity

In the navigation pane, you can select the visitors that are shown on the screen. Switch between viewing the activity of All Visitors on your website(s) or viewing visitors on the world Density Map . If filters have been created, you can also choose to view visitors in groups based on the pages they are viewing. For example, sales agents may only be interested in visitors on product pages or people who are progressing through your shopping cart, while marketing agents may be interested in visitors on specific landing pages that were used for

promotions. For more information on creating and managing filters, please see Who's On Filters .

In the content pane, the list of website visitors can be found. In general, the following details can be seen for each visitor in the list:

- Email/IP Address - If logged in, the email address of the visitor will be displayed. Other users will appear as Anonymous User next to their IP address.
- Current Page - The current page URL the visitor is browsing.
- Language - The primary language of the customer as indicated from the customer's Web browser.
- Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.

To view (or print) additional information about a visitor, simply click a visitor and the visitor's Who's On summary will load in the preview pane. Click the Print button to print the information. Who's On summary details are organized within the following tabs:

Note: The information provided in the Who's On summary pertains to the current session only.

- Page Summary - This tab organizes the pages the visitor viewed by the number of times the visitor hit each page. This tab also includes information about the initial page title, the initial referrer, the current referrer, and the total amount of time the visitor spent on each website or portal page.
- Page History - This tab displays the website and portal pages the visitor viewed in chronological order. This tab also includes the time the visitor viewed each page, the length of time the visitor viewed each page, and the number of hits for that page.

In general, the following visitor details can be found in the Who's On section:

- Tracking Status - Indicates whether the visitor is being tracked by Who's On.
- If the status is active, Who's On is tracking the visitor.
- If the status is pending, Who's On will resume tracking the visitor once the visitor navigates to another page of your website or portal.
- If the status indicator is removed, Who's On is not tracking the visitor.

• Started At - The date and time the session was initiated.
• Hits - The number of times a visitor hits any page of your Website or portal. Note: Only pages that are configured for Who's On tracking will be included in this figure.
• Duration - The amount of time the visitor has been on your website or portal.
• Idle - The amount of time that passed since a visitor has navigated to a page within your website or portal. Note: Idle users are automatically removed at 15 minutes.
• Country - The customer's geographic information. Note: Geographic information is not always available.
• IP Address - The customer's IP address.
• Host Name - The unique name by which the visitor's networked-attached device (computer, cell phone, etc.) is known on a network.
• Host Domain - The name of the server on which the visitor's network is hosted.
• City - Based on their IP address, the City the visitor is coming from, when available.
• Region - Based on their IP address, the geographic region the visitor is coming from, when available.
• Language - The primary language of the customer as indicated from the customer's Web browser.
• Browser - The Web browser the customer is using to connect to the company site. Note: Browser information is not always available.
• OS - The operating system of the customer's computer. Note: OS information is not always available.
• Initial Page - The URL of the first page of your Website or portal that the visitor viewed.
• Initial Virtual Page - The first page of your Website or portal that the visitor viewed as defined by the tracking script set by the administrator. Virtual pages can be used to summarize the contents of the initial page. For example, if the initial page URL is lengthy, the administrator may want to create a virtual page with a shorter identifier.
• Initial Page Title - The title of the initial page.
• Initial Referrer - The URL of the Web page the visitor navigated from to reach your Website or portal.
• Current Page - The current page URL the visitor is browsing.

- Current Page Title - The title of the current page the visitor is browsing.
- Current Referrer - The URL of the Web page the visitor last navigated from.

Managing Who's On Filters

SmarterTrack's Who's On feature gives agents the ability to see who is browsing the company portal and/or any website that contains the Who's On tracking code. With Filters, administrators and agents have the ability to segregate website and/or portal visitors into groups based on the pages they are viewing. For example, sales agents may only be interested in visitors on product pages or people who are progressing through your shopping cart, while marketing agents may be interested in visitors on specific landing pages that were used for promotions or in currently-running advertisements on radio, television, banner ad campaigns or PPC. By utilizing the Conditions available when creating a Filter, website or other traffic can be siloed, so people wanting specific information have that information at their fingertips.

Who's On filters can be added directly within the Who's On section. To add a filter or edit an existing one, log into the management interface with your agent account. Then select Who's On from the Navigator. A list of existing filters will be displayed in the navigation pane, generally below the preconfigured All Visitors and Density Map. (If no filters have been configured, then only those 2 options are available.) In the bottom corner of the navigation pane, use the menu to access the following options:

- Add Filter - Creates a Who's On filter.
- Edit Filter - Allows the administrator to make changes to a filter's settings. The filter name must be selected in order to edit.
- Delete Filter - Permanently deletes the selected filter. The filter name must be selected in order to delete.

When adding or editing a filter, the following tabs are available:

Filter

Use this tab to edit the following settings:

- Filter Name - The name of the filter.
- Brand Filter - The brand to which the filter is assigned. If the filter should apply to all brands, select None.

Conditions

Use this tab to specify how this filter will group visitors (by browser, city, hits, page(s) visited, etc.). When viewing this tab, the following options are available from the toolbar:

- Save - Allows the administrator to save changes made to a filter's settings.
- Add Condition - Allows the administrator to add filter criteria.
- Edit - Allows the administrator to make changes to filter criteria.
- Delete - Permanently deletes the selected condition(s).
- Cancel - Cancels the creation of the filter.

For definitions of the conditions available and for more information on Who's On, please see Who's On Overview .

Active Agents

Active Agents

Formerly known as the "Dashboards", agents who are assigned the Manager role can use Active Agents to view a variety of information about agents, groups and departments. For example, viewing By Agent allows a manager to see a listing of active and inactive agents, information about the groups the agents are logged into and more. By Agent also allows managers to edit an agent's Active Groups . By Group offers an overview of each group set up within SmarterTrack, including information about the number of active tickets, chats, and calls, and information about the number of agents active for tickets, chats, and calls. Finally, By Department gives managers information about each department set up within SmarterTrack.

By Agent

The ability to see the status and Active Groups of each agent in SmarterTrack is important to ensure that your agents are logged in, that they are actively taking care of customers and that there isn't a hole in your coverage. For example, if you notice that the phone is ringing

continuously, you can use this view and see who is available to take calls, and maybe get one or two more agents logged in. To start or stop an agent's ticket, live chat, and/or call activity for a particular group, double-click on the agent or select the agent and use the Edit button to open their status in a modal.

On the Active tab of the By Agent view, the following columns are available:

- Display Name - This column will list all agents who are active in at least one group.
- Status - An agent's availability, which reflects their overall live chat status. If an agent is listed as Available, they will be automatically assigned live chats based on the group's live chat distribution and their active groups. If a user is set to Unavailable, they will not be automatically assigned new live chats for ANY group. Note: An agent set to Unavailable will still receive tickets based on the ticket distribution method set up for the group, as long as they are active for tickets in that group.
- Ticket Groups - The number of ticket groups the agent is active in vs. how many they are assigned to. For example, 15/16 means that the agent is active in 15 of the 16 ticket groups they are assigned to.
- Chat Groups - The number of live chat groups the agent is active in vs. how many they are assigned to. For example, 6/10 means that the agent is active in 6 of the 10 chat groups they are enabled to receive live chats for.
- Call Groups - The number of call groups the agent is active in vs. how many they are assigned to. For example, 3/6 means that the agent is active in 3 of the 6 call groups they are assigned to in order to receive SmarterTrack Communicator calls.
- Active Tickets - The number of tickets currently in the agent's Active queue. If two numbers are shown that indicates that the agent has a max ticket limit in that group. For example, 6/15 means that the agent has 6 tickets in their Active queue with a max ticket limit of 15.
- Active Chats - The number of active live chats the agent currently has vs. their max live chat setting. For example, 2/5 means that the agent has 2 active live chats but they can have a maximum of 5 occurring at once.
- Active Calls - Whether the agent is active on a phone call. Note: This setting is only available for customers using SmarterTrack Communicator, the SIP-compliant soft-phone add-on for SmarterTrack.

On the Inactive tab of the User dashboard, the following columns are available:

- User - This column will list agents who are inactive in all ticket, live chat and call groups.
- Ticket Groups - The number of ticket groups the agent is active in vs. how many they are assigned to. For example, 0/16 means that the agent is not active in any of the 16 ticket groups they are assigned to.
- Active Tickets - The number of tickets currently in the agent's Active queue. If a fraction is shown, it indicates that the agent has a max ticket limit in that group. For example, 6/15 means that the agent has 6 tickets in their Active queue with a ticket limit of 15.

By Group

This view gives managers an overview of what is going on with each group in SmarterTrack. Being able to see an overview of the workload for each group is important as it can show managers where agents are spending their time. If a given group only has 1 out of 6 agents active, it's good indication that some attention should be paid to that group; either it's understaffed or that group isn't terribly busy.

On the By Group view, the following columns are available:

- Group Name - Each group set up in SmarterTrack will be displayed in the Group dashboard.
- Active Tickets - The number of active tickets for the group. This does not include tickets with a Waiting or Closed status.
- Active Chats - The number of active live chats for the group. This does not include chats in inactive status.
- Active Calls - The number of calls currently occupying agents. Note: This setting is only available for customers using SmarterTrack Communicator, the SIP-compliant soft-phone add-on for SmarterTrack.
- Ticket Agents - The number of active agents receiving tickets for the group vs. how many agents are assigned to the group. For example, 15/16 means that there are 15 out of 16 agents active in tickets for the group.
- Chat Agents - The number of active agents receiving live chats for the group vs. how

many agents are assigned to the group. For example, 6/10 means that there are 6 out of 10 agents active in live chats for the group.

• Call Agents - The number of active agents currently set up to use SmarterTrack Communicator for the group vs. how many agents are assigned to receive calls using SmarterTrack Communicator for the group. For example, 3/6 means that there are 3 out of 6 agents active to receive calls using SmarterTrack Communicator for the group.

By Department

The By Department view gives a very high level overview of what is going on with the company in general, and each department in particular. Viewing By Department is a good way to get a feel for how busy your agents are on a macro level. From there, managers can drill down using the By Group and By User views.

On the By Department view, the following columns are available:

• Department Name - Each department set up in SmarterTrack will be displayed in the Department dashboard.

• Active Tickets - The number of active tickets for the department. This does not include tickets with a Waiting or Closed status.

• Active Chats - The number of active live chats for the department. This does not include chats in inactive status.

• Active Calls - The number of calls currently occupying agents in the department. Note: This setting is only available for customers using SmarterTrack Communicator, the SIP-compliant soft-phone add-on for SmarterTrack.

• Ticket Agents - The number of active agents receiving tickets for the department vs. how many agents are assigned to the department. For example, 15/16 means that there are 15 out of 16 agents active in tickets for the department.

• Chat Agents - The number of active agents receiving live chats for the department vs. how many agents are assigned to the department. For example, 6/10 means that there are 6 out of 10 agents active in live chats for the department.

• Call Agents - The number of active agents currently set up to use SmarterTrack Communicator for the department vs. how many agents are assigned to receive calls using SmarterTrack Communicator for the department. For example, 3/6 means that

there are 3 out of 6 agents active to receive calls using SmarterTrack Communicator for the department.

Settings

My Settings

My Preferences

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

Options

• Username - The username that is used to log into SmarterTrack. Only administrators can modify this setting.
• Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow agents to log in using a standard password, authenticate against active directory or by using an external provider that integrates your login with an external, third-party product like a CRM or control panel. Only administrators can modify this setting. Note: If the administrator has chosen password authentication, agents can modify their passwords by using the Change Password button in the content pane toolbar.
• Authentication Domain - When Active Directory authentication is used, this is the domain name used for the authentication of your login username and password. Only administrators can modify this setting.
• Email Address - The agent's email address.
• Display Name - The friendly name used to identify the agent within the SmarterTrack system.
• Display Name for Chat - There are times when agents may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for

safety reasons, they want to use an alias. Adding in a name here will replace the agent's real name when they interact with customers via live chat.

• Time Zone - To specify the time zone, select the appropriate time zone from the list. While the default time zone is set by the administrator, agents can adjust their time zone based on their location. This is helpful for those companies that have customer service agents working in different geographic locations.

• Preferred Language - The language the agent would like the Web interface to be shown in. The list of languages in the drop-down menu is pulled from the list of configured Supported Languages.

• Theme - Specify the general color theme of the SmarterTrack management interface: Light or Dark.

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

Contact Info

Basic contact information can be set up for an agent, such as their cell number, home phone, etc.

Portal Settings

• Avatar Provider - SmarterTrack allows agents and users to use popular services for maintaining consistency with the avatars they use across the internet. This dropdown lists several, along with the option to upload a custom avatar.

• Avatar - The display picture as provided by the Avatar Provider or the avatar uploaded via the Choose File button.

• Subscribe to community posts automatically - Checking this box allows you to automatically subscribe to Community threads that you create or post in.

• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads you're subscribed to that have had a new reply or the status or type changed.

• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.

• Portal Signature - Agents can use this field to create a signature that will be displayed on Community threads and in their replies to Community posts. (NOTE: Signatures that appear in ticket replies are handled by the SmarterTrack administrator, not by individual agents.) Using the HTML editor, Agents can fully customize their signatures either by using the toolbar in the HTML editor or editing the code manually clicking on the editor's Code View (<>) button. Changes made here will be reflected in the Portal Signature setting found in the My Settings area when logged into the Portal and vice versa.

Custom Fields

This tab displays the available custom fields for agent preferences. For more information on custom fields, see Custom Fields . If there are no custom fields set up for agents, this page will be blank.

Tickets

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

• Copy To Address - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.

• Other Reply From Address(es) - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be

entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.

Live Chat

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

• Pop-up new chats automatically - Checking this box will display new live chats in a popup window. By default, this option is enabled.
• Play chat sounds - Checking this box will enable SmarterTrack to play sounds when certain timeframes are exceeded or when certain things occur. By default, this option is enabled. Sounds will occur in the following instances:

• When a chat initially goes into the Queue, before it's taken by an Agent. (When Round Robin is NOT being used for Live Chat distribution.)
• When a chat enters an IDLE status when being handled by an Agent.
• When a chat enters a WARNING status when being handled by an Agent.
• When a chat enters a CRITICAL status when being handled by an Agent.
• When a chat is being handled by an Agent, but the chat window ins't focused, and a new message is received from an end user.
• Play sound when a chat is queued - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.

My Events

Using SmarterTrack's extensive event system it's possible to detect events as they occur, generate messages for those events, and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. With notifications, administrators and agents don't have to query for the status of the items in the system - they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterTrack: agent-level events and system-level events. For more information on system-level events, please see Events . For a complete breakdown of the events system, including how to create a new event and details on the

event categories available, see the Events folder found in the Settings section of the Online Help.

To access agent-level events, log into the management interface with an agent account. Then select Settings in the Navigator. From here, click on My Events in the navigation pane. A list of configured events will load in the content pane, or the page will be blank if no events are configured. Regardless, the following tabs are available:

Events

Agent-level events configured in this section apply only to the agent configuring the event. In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Alternatively, it is possible to select all events by clicking the checkbox in the header. 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 (displays a checkmark) or disabled. The event will only trigger if it is enabled.
- Category - The feature to which the event pertains. (I.e., Tickets, Survey, Who's On, etc.)
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet in order to trigger the action(s).
- Actions (...) - The action(s) that occur when the conditions are met and 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 Conditions and Actions tabs will load in the content pane. To create a new event, click the New button on the content pane toolbar. For more information on how to create a new event, see Creating New Events .

Notification Profiles

Notification profiles determine how event messages are sent. Options include text message

or email. Agents can modify the default notification profile or create additional ones using the New button in the content pane toolbar.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the toolbar.
- Profile Name - The name of the profile.
- Type - The types of notification the agent has enabled for the selected profile.

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Profile Name - The name of the profile.
- Email Addresses - The email address(es) to which notifications are sent.
- Enabled - Checking this box will enable email notifications.
- SMS Email Addresses - The mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Show reminder in interface - Checking this box will allow the agent to receive notifications in the notifications area of the SmarterTrack interface.

System Settings

Brands

A brand is the top level of the SmarterTrack help desk. For smaller companies, the brand is just another name for the company itself so there may only be one brand in SmarterTrack. However, companies with different divisions may want to use SmarterTrack to manage all company communications, separately, for all divisions. In addition, some companies have different brands that specialize in specific products and/or clientele. SmarterTrack can accommodate all of these scenarios, and many more, by allowing companies to set up separate brands without having to install multiple different instances of SmarterTrack.

The TRUE benefit of Brands, however, is in employee management. Utilizing a multi-brand configuration in SmarterTrack allows a company or business to support all of their brands

using a single agent base. That means that a single agent can handle sales or support (or billing...or customer service...) requests from multiple brands at the same time. This allows a company to maximize their coverage while minimizing the need to hire agents specifically for one brand. Agents can work with customers in each brand separately, and customers of each brand have access to customized and brand-specific web portals.

Features that support branding include tickets, live chats, knowledge base articles, news items and the portal interface, as well as department and group creation. That means that each brand can have its own set of departments and groups, and agents can be attached those brand-specific departments and groups, or to departments and groups across multiple brands.

To access the Brands section, log into the management interface with an administrator account. Then select Settings from the Navigator. Next, click on Brands in the navigation pane. Any brands associated to your SmarterTrack installation will load in the content pane.

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

Jump to:

- Options
- Permissions
- Portal
- Cookie Disclaimer (If enabled on the Options tab.)
- Custom Links
- Autoresponders
- Business Hours
- Holidays
- Custom Messages
- Community Categories

Options

Use this tab to edit the following settings:

• Brand Name - The name of the brand. This can be a company name, a product name, a division of the company, etc.
• Host Headers - Host headers allow a web server to host more than one website domain over a single IP address. In SmarterTrack, the host header will be used to identify which brand is displayed in the portal. For those using self-installed SmarterTrack, you will want to make sure your SmarterTrack domain in IIS has the proper bindings set up for the various host headers you want to use in addition to adding them for each Brand in SmarterTrack. For those using the hosted SmarterTrack helpdesk, please see Point Your Own Domain Name at your Hosted SmarterTrack Helpdesk . Note: Host headers cannot be edited after the brand is created.
• Company Website - The URL to the primary website for the brand.
• Enable Cookie Disclaimer - Enabling this will activate the Cookie Disclaimer tab. This tab allows a system administrator to create customized text that appears when someone visits the Portal for the first time. This disclaimer explains the brand's cookie policy and can be used to link to a more detailed cookie policy page.
• Default Font - The font family that will be used by default for items created within or for the brand, such as ticket messages, canned replies, knowledge base articles, etc.
• SMTP Account - SmarterTrack does not have an internal SMTP server for sending replies to tickets, which are standard email messages. Instead, it uses an existing email account that's configured on an existing mail server or email service. Use this drop down to select the mail settings for brand-level notifications. Note: The options available in the dropdown list are based on the SMTP Accounts configured in the Email settings . If the necessary account is not listed in the dropdown, it is possible to add one by clicking Add SMTP Account . The new account will be added to the Email area as well. Once clicked, a modal window will display the following options:

• Server - The outgoing SMTP server name.
• Email Address - The email address from which brand messages are sent.
• Display Name - The name used to identify the mail server. This field is optional but recommended.

• Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
• Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
• SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.
• Ignore SSL warnings - Select this option to ignore any SSL warnings received when connecting the SMTP account. Generally, SSL warnings are just those: warnings. Ignoring them does not mean that there is something incorrect in the set-up.
• Default - Check this box to make the SMTP account that's set up as the Default SMTP account for the entire Brand.
• Google Analytics Site ID - The unique identifier used to track your site in Google Analytics. Adding in a Google Analytics ID helps track visitors to all pages of your SmarterTrack site: the Portal, Management Interface, etc.
• Company Favicon - A favicon is an icon that is associated with a URL and displayed in a browser's address bar or next to the site name in a bookmark list. Upload a custom favicon for the brand by clicking on Choose File. Then browse for the ICO file. (Favicons must be uploaded in .ico format. Recommended sizes for a favicon are 32x32, 64x64 or 128x128 pixels.) Click Save then navigate to the brand's Portal or refresh the Portal site to see the new favicon. (In some browsers, refreshing the Portal 2-3 times may be required before the browser will pull in the new favicon data.) Note: If multiple brands are configured, the favicon of the Default Brand will be displayed when viewing the Management Interface.
• Display logo on portal - Checking this box will display the company logo on the Home page of the Portal.
• Company Logo - The logo to use for the brand. Click on Choose File to upload an image. Remove Logo deletes the uploaded logo and reverts to the default, or you can upload a new company logo as needed.

Permissions

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

- View Community - From the dropdown, select the Role necessary for portal visitors to view, and reply to, various threads in the Community. If the Community needs to be hidden from everyone, this should be set to Nobody and it's button will not be displayed on the Portal. Note: This selection also determines which users can privately message other users at the Portal. Community messaging is enabled for any Registered User with permission to view and participate in Community threads.
- Create Community Threads - From the dropdown, select the Role necessary for portal visitors to start new threads in the Community.
- Minimum Posts to Post Links - Administrators can now control the minimum number of Community posts a user must have before they can post links to other sites or services that are clickable. This is to prevent one-off, drive-by spamming of Community posts from single-post users. By default, this is set to 3.
- Post Links in KB Feedback - Similar to the above, Administrators can limit the type of user that is able to post links in KB feedback. By default, this is set to Registered User with Verified Email as these types of users are generally confirmed by a company.
- View Ticket Requires - From the dropdown, select the Role necessary for portal visitors to view tickets in the portal.
- View News Requires - From the dropdown, select the Role necessary for portal visitors to view News items in the portal.
- View KB Articles Requires - From the dropdown, select the Role necessary for portal visitors to view Knowledge Base articles in the portal.
- Users can change display name - Checking this box will allow users to change their display name. By default, this setting is enabled.
- Users can change email address - Checking this box will allow users to change their email address on file. By default, this setting is enabled.
- Users can change password - Checking this box will allow users to change their login password. By default, this setting is enabled.
- Users can change profile information - Checking this box will allow users to change their profile information on file. Profile information includes phone numbers, address,

time zone and preferred language. By default, this setting is enabled.

• Users can upload custom avatars - Checking this will allow users to upload their own, custom avatars for display in the portal, such as in the Community.

• New feedback starts out moderated - Checking this box means that any new feedback left on a knowledge base article will first have to be reviewed and approved by a portal administrator before it is viewable by users. By default, this option is checked.

• Require approval for custom avatars - Checking this means that any custom avatar use will first need to be approved by portal administrators before they are displayed in the portal.

Portal

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

• Display live chat in portal - Checking this box will display a link to initiate a live chat throughout the Portal. By default, this setting is enabled.

• Display social network links - Checking this box will display social network links in the portal that will allow knowledge base articles and news items to be shared to these networks. By default, this setting is enabled.

• Display option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.

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

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

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

websites. Checking this box allows users to use their Gravatar images versus uploading a custom image.

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

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

• Chat Link Style - Use this dropdown to select the live chat link to be displayed on the portal. Any live chat link configured in the Configuration | Live Chat settings will be displayed here.

• Primary Color - This is the color for the main menu buttons on the portal (Home, Knowledge Base, News, etc.) and the titles of the news items on the News page. The default is (241 241 241) RGB or (#F1F1F1) HEX.

• Secondary Color - This is used for minor highlights such as lines, separators, asterisks, etc. that are used throughout the Portal. The default is (187 187 187) RGB or (#BBBBBB) HEX.

• Primary Button Color - The standard button color for buttons such as Start Ticket, Submit Thread and the icons on used for the Knowledge Base, Community, Tickets, etc. The default is (58 135 173) RGB or (#3A87AD) HEX.

• Secondary Button Color - The color for secondary buttons such as Search buttons. The default is (102 102 102) RGB or (#666666) HEX.

• Button Text Color - The color for text that appears in both primary and secondary buttons. The default is (255 255 255) RGB or (#FFFFFF) HEX.

• Content Background Color - The default color for the main content areas of the portal. The default is (255 255 255) RGB or (#FFFFFF) HEX.

• Navigation Bar Color - The color of the top bar of the portal, where the User, Alerts and language selection buttons reside. The default is (84 84 84) RGB or (#545454) HEX.

• Text Color - The color for the majority of text as it appears in the portal and on the community. This includes KB text, community posts, etc. The default is (51 51 51) RGB or

(#333333) HEX.

• Link Color - This is the color for any hyperlinks on the portal, including those used to view knowledge base articles, links to view tickets and threads and any links within the KB articles or Community threads. The default is (0 102 147) RGB (#006693) HEX.

• Custom CSS Style Overrides - Note: To modify SmarterTrack's styles, it is strongly recommended that you have a good understanding of cascading stylesheets and how to modify them. SmarterTrack allows administrators to stylize their brand portals with fully customizable CSS. To modify a style, you should first use a Web browser like Chrome to inspect the element that you want to modify. (Using FireFox's Firebug plug-in will work as well). By inspecting the element you will see the class used and any styles associated with the class. You can create a version of that style yourself and then paste it in this box to override the default. Realize this will happen wherever that style is used, so changing one style can affect the portal in multiple areas. To revert back to the default style, simply remove your custom style from here and save your changes.

Cookie Disclaimer

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

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

• Privacy, Cookie and Terms of Service Disclaimer - This is the text that is displayed in the modal pop up once the option is enabled. The modal appears at the bottom of the portal the first time a user visits. Ideally, this text lets users know that the portal uses cookies to store a user's settings changes, and can include login details if the user opts-in to saving these login credentials. Generally, this text is short but it should include a

link to a more detailed privacy or cookie policy for your company.

• Disclaimer Modal Primary Color - This is the background color of the modal that displays the disclaimer text. By default, it's set to #237AFC.

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

Custom Links

In order to create a sense of community with end users, companies may want to expand their Portals and use them as hubs for disseminating news and information. One way to do this is to add custom links on their Portal to other websites and resources. For example, link to a blog, to a community forum, to a management interface and more. When adding custom links, administrators define the custom link title that is placed on the Portal and that links to a specific URL. Custom Links are different than external feeds in that External Feeds will actually extract snippets from the feed listed and display that text as a section on the Portal home page whereas Custom Links create new text that is displayed under the main portal buttons and that link directly to the link URL provided.

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

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

• Title - The link name displayed in the portal.

• Link URL - The URL to the linked website.

• Link Target - To specify how the linked site will open, select the appropriate option from the list. "_blank" is used most often as that opens the link in a new browser window or a new tab.

• Role Required - To specify which users have access to the link, select the appropriate role from the list. For more information, see Roles .

Autoresponders

Autoresponders allow system administrators to configure an automatic response that's sent to customers when they submit tickets to various Departments within SmarterTrack. SmarterTrack has default autoresponders that can be used, but they can be edited, or completely re-written, to include links to KB articles and additional resources that can help

answer commonly asked questions. It's even possible to include new product announcements or other marketing-type material in autoresponders.

To edit an autoresponder, locate the autoresponder by its display name. Select it and click Edit in the content pane toolbar. (Alternatively, you can double-click on the autoresponder to open it.) A modal window opens that displays the following tabs:

- Options

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

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

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

• Departments

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

Note: SmarterTrack will only send a maximum of 3 responses to any single email address per 30-minute period. This is to keep SmarterTrack from accidentally spamming individual email addresses or possibly getting into looping issues with improperly configured vacation messages or other external auto-responders. SmarterTrack simply stops sending after sending 3 times. Messages do not sit in the outgoing spool and wait to be sent. In addition, when importing emails, the Department auto-responder will not be sent if an email is more than 3 days old.

Business Hours

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

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

Holidays

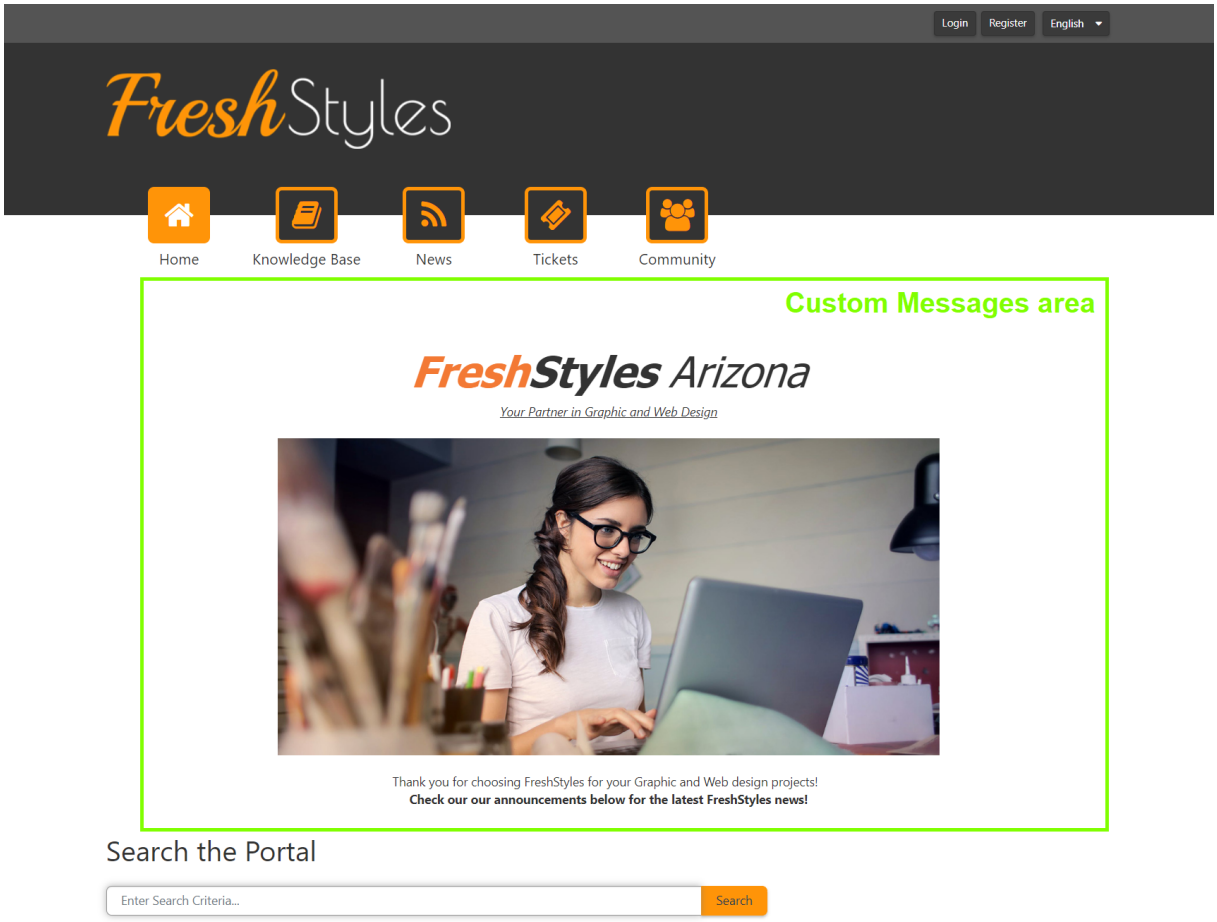
Use this tab to specify company holidays. To add a holiday, click Add in the content pane toolbar. Note: Live chat will automatically be disabled (offline) on holidays.

Custom Messages

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

• Main Portal Announcement - The text that displays on the portal home page. Some companies may choose to write a welcome message or a description of the types of services customers might find on the self-service portal. Others may want to add graphics, banner ads or more to completely brand and customize how the portal looks for visitors. The Main Portal Announcement offers a complete WYSIWYG editor that allows all manner of customization. Regardless of what's added, the announcement will appear at the very top of the main content area of the portal.

• Additional Footer for Portal - The text that displays at the top of the portal footer above the SmarterTools copyright information.



Community Categories

SmarterTrack's Community is a centralized location brands can use to communicate with customers and end users, which is a key for any business. Categories are used to separate threads within the Community and can be things like keywords, product names, general categories like "General Discussion", and more. By default, there aren't any categories created for new installations. This allows a business to fully customize what's discussed in their

community. To add a category, click the Add button in the content pane toolbar and the Category modal appears. Add in the category name, and the role required to post to that category. (Be default, the Everyone role is selected.) Once a category is added, it will appear as an option, along with your other categories, for any new Community threads. For more information or roles, see Roles .

Departments

A department is the second level of the SmarterTrack organizational structure. Each brand will be broken down into departments. For example, a brand may have Sales, Support and Human Resources departments. Typically, each department will have its own email address, such as support@@example.com or sales@@example.com. This section lists all of the departments that are currently available to your organization and provides administrators with the ability to add new departments or edit/delete existing departments.

To access this section, log into the management interface with an administrator account. Select Settings from the Navigator, then click on Departments in the navigation pane. Any departments associated to your company will load in the content pane. Generally, default departments are available on installation, and system administrators can add to, or change, departments during the installation and set up process. However, departments can be managed as often as needed, even post installation.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The name of the department. For example, Sales, Support, Billing, etc.
- Email Importing - The POP email address being used to import tickets into SmarterTrack for the department. If a dash is present for a department, then POP importing is not configured for that department.
- Agents - The number of agents assigned to the department.
- Active Tickets - The number of active tickets within the department.
- Active Live Chats - The number of active live chats within the department.

The following options are available from the content pane toolbar:

- New - Creates a new department. When creating a new Department, both the Department Name and Front Line Group are required. The Front Line Group is the first group to which tickets and live chats for the Department will be assigned. SmarterTrack will automatically create the Front Line Group after you have completed and saved these settings. All other configuration settings are optional. However, if you are using SmarterTrack's branding feature, you will also need to configure the appropriate Brand name setting. In addition, if you are supporting multiple languages, you will need to configure the appropriate language setting.
- Edit - Allows the administrator to make changes to a department's settings.
- Clone - Rather than creating a department from scratch, administrators can clone an existing department and modify settings for the new department as needed.
- Delete - Permanently deletes the selected department(s). When deleting a Department you'll need to choose the action to take for items that belong to this Department. This includes how to handle ticket, live chat, call log and call log agent assignments. Generally, these will need to be handed off to another Department, if at all possible. Otherwise, information may be deleted.

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

Jump to:

- Options
- Tickets
- Call Logs
- Business Hours
- Holidays
- Custom Messages

Options

- Brand - The brand to which the department belongs.
- Department Name - The name of the department.

• Front Line Group - The default group that gets assigned tickets and live chats for the department. If groups are available, they will appear as a dropdown. If no group is available, you can type the name of the group in the box and it will be saved and added on the Groups page, and automatically assigned to the brand and department. (NOTE: A department can only have one front line group.)
• SMTP Account - SmarterTrack does not have an internal SMTP server for sending replies to tickets. Instead, it uses an existing email account that's already been configured on an existing mail server or email service, and preferably an account that's already associated with the department that's being set up. The options available in the dropdown list are based on the SMTP Accounts configured in Email settings . If the necessary account is not listed in the dropdown, it is possible to add one by clicking the Add SMTP Account button. Once clicked, a modal window will display the following options:

• Server - The outgoing SMTP server name.
• Email Address - The email address from which department messages are sent.
• Display Name - The name used to identify the mail server. This field is optional but recommended.
• Encryption - Select the level of security used for sending emails: None, SSL, or TLS.
• Server Port - The port used to connect to the SMTP Server. By default, the SMTP Server port is 25. Note: If SSL or TLS is used, this port will need to change to match the security setting.
• SMTP Auth Username - The identifier used to authenticate with the SMTP server. This field is optional.
• SMTP Auth Password - The corresponding password used to authenticate with the SMTP server. This field is optional.
• Preferred Language - The default language for the department.
• Allow all agents to find items in this department using advanced search - Frequently, agents may need to access tickets in a department that they don't belong to in order to respond to customer inquiries. Enable this setting to mark a department as having their ticket contents visible to all agents. Agents can then find those items and see them in a read-only manner when using Advanced Search. Managers are allowed to modify any item found this way, while agents are allowed to add comments only.

• Allow managers outside of this Department to view its contents. By default, only Employees with the Manager role can see the tickets in all Groups within a given Department. However, there are times with Managers in other Departments need to see tickets. This is especially true if 2 Departments work closely together, such as Sales and Support Departments. With this checked, Managers from ANY other Department can view the tickets within the Department being edited.
• Mark Time Logs as billable by default - Enabling this means that SmarterTrack will mark any time logs created for the department, whether automated or manual, as billable. Billable time logs take an agent's "Hourly Cost for Reporting" into account.

Tickets

• New Tickets in Portal - The role required to submit a ticket via the portal. For more information, see Roles . NOTE: When set to "Nobody", this department will not show up in the Departments dropdown when tickets are submitted from the portal.
• Custom Field Template - The custom field template used when submitting tickets from the portal. The ticket template specifies which fields the user should complete when submitting a ticket. For more information, see Custom Fields .
• Survey to Offer When Closed - To automatically offer a survey to customers after a ticket status has been changed to "closed" or "closed and locked", select the appropriate survey from the list. For more information, see Surveys .
• Auto-Close After - The number of hours after which a ticket assigned to the department and marked as "waiting" will automatically close. The default setting is 168 hours. NOTE: If any action is performed on a ticket, such as transferring it to another agent or group or even commenting the ticket, the waiting time will reset.
• Auto-Lock After - The number of hours after which tickets assigned to the department and marked as "closed" will automatically lock. (Locked tickets do not automatically reopen when a customer sends a reply.) The default setting is 322 hours.
• Auto-Delete After - The number of days after which tickets assigned to the department with a "closed" or "closed and locked" status will automatically be deleted. The default setting is 365 days.
• Require resolution to close tickets - Checking this box will require agents to add a resolution to a ticket before they are able to close it.

- Require all tasks to be completed to close tickets - Checking this box will require agents to complete any tasks associated to a ticket before the ticket can be closed.
- Send notification to customer when tickets are auto-closed - Checking this box sends an email notification to the customer when a ticket is auto-closed. For more information, see Templates section of Email .

Call Logs

- Custom Field Template - The custom field template used to create a call log. The call log template specifies which fields the agent should complete when logging a call. For more information, see Custom Fields .
- Auto-Delete After - The number of days after which call logs assigned to the department will automatically be deleted.

Business Hours

Use this tab to specify the days and times the organization operates and when staffing is available. A department's business hours can be inherited from the brand by checking the box next to "Inherit business hours from Brand." In order to configure business hours for the department separately, this box should remain unchecked. For example, a Support Department may run 24 x 7 while other departments follow the brand's business hours. To edit or remove a day, select the desired day and click Edit in the content pane toolbar. To remove a day from your business hours, delete the start and end times and save your changes. This will deselect that day and remove it from the brand's available business hours. That day will then be displayed as Closed.

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

Holidays

Use this tab to specify company holidays. A department's holidays can be inherited from the Brand or configured separately. To add a holiday if holidays are not inherited from the brand, click Add in the content pane toolbar.

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

Custom Messages

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

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

Groups

Groups are the third level in the SmarterTrack structure. Each department is broken down into divisions called groups. For example, a support department may have Level 1 Support (less experienced support agents), Level 2 Support (more experienced support agents), and Support Management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying levels of access to information. This section lists all of the groups that are currently available to your organization and provides administrators with the ability to add new groups and/or edit/delete existing groups.

To access this section, log into the management interface with an administrator account. Select Settings in the Navigator, then click on Groups in the navigation pane. Any groups associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple departments. Departments must be selected before choosing an action from the toolbar.
- Department - The department to which the group belongs.
- Group Name - The name of the group.
- Round Robin - A True/False indication of whether tickets are distributed automatically via round-robin distribution. If False, tickets will need to be manually taken from the

queue. For an explanation of the two distribution methods, see Ticket Distribution Methods .

- Agents - The number of agents assigned to the group.
- Active Tickets - The number of active tickets within the group.
- Active Live Chats - The number of active live chats within the group.

The following options are available in the content pane toolbar:

- New - Creates a new group.
- Edit - Allows the administrator to make changes to a group's settings.
- Delete - Permanently deletes the selected group(s).

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

Options

- Department - The department to which the group belongs.
- Group Name - The name given to the group.

Agents

This tab gives administrators the ability to add, edit, and delete agents from the group. To view or change the settings for a specific employee within the group, simply double-click the employee and the agent-group relationship settings will load in a modal window. To add an agent to the group, click the Add button. When you do, the following options will be available:

- Agent - A dropdown where you select the name of the employee that is being added to the group.
- Ticket Handling - Select the method of ticket distribution for this agent. If round-robin distribution is the desired ticket distribution method for this group, at least one agent needs to be assigned to a distribution group. Options include:

- Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. The agent will still be a member of the group, so they will

be able to see tickets for the group, receive transfers, cherry-pick tickets, etc. but they will not receive any tickets automatically. Instead, they'll have to take tickets from the queue, or take them from other agents. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.

• Primary Group - Agents in the primary assignment group will be the first to automatically receive tickets via round-robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.

• Secondary Group - Agents in the secondary group will receive automatic round-robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

• Max Tickets - The maximum number of new, active tickets an agent can have at a time. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.

• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.

• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in for the group, receive chat transfers, cherry-pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.

• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, via round-robin distribution. Agents in

this group can include specialists for the group, senior agents or other "go to" individuals for the group.

• Secondary Group - Agents in the secondary group will receive automatic round-robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

• Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.

• Hand-off on Auto-Inactive - Checking this box will automatically hand off any of an agent's active tickets to another agent if the agent is automatically made inactive in the group.

• Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set themselves as active across their various groups.

Editing / Removing Agents

Follow the steps below to edit an existing agent in a group:

• From Groups , find the group you want to edit. Either double click it or select it and click Edit in the content pane toolbar.

• Click the Agents tab. A list of all Agents currently assigned to the Group will display.

• Select the agent you want to edit and either click the Edit button or double-click on the agent. The Agent-Group Relationship modal window opens.

• The agent's name cannot be edited, but other areas can: Ticket/Chat Handling, Max Tickets, etc.

• Once your changes are made, click OK in the modal.

• Click Save in the content pane. If you do not click the save button, your changes will not be saved if you move off of this page.

To remove an Agent, select the Agent and click the Remove button.

Time Estimates

This tab gives administrators the ability to associate specific times with certain ticket and live chat tasks. Assigning ticket and live chat time estimates are helpful when using cost analysis reports. For a very basic example, knowing that an agent will take an average of 10 minutes working on a new ticket tells you that an agent should be able to get through 6 tickets an hour. In an 8-hour shift, that means 48 tickets total. When coupled with agent cost, that number tells you what your support costs would be for that agent for that number of tickets. Managers and business owners can then use that information when making decisions on the types of support to offer (live chat, tickets or both), whether to offer paid or free support, whether to increase costs of goods and/or services to account for support costs, etc. In addition, these estimates can be used to project when a department and/or group is at the point where another agent or two is required in order to handle the workload.

- Ticket Created - The estimated number of minutes agents will spend creating a new ticket.
- Ticket Transferred - The estimated number of minutes agents will work on a ticket that has been transferred to them.
- Ticket Message In - The estimated number of minutes agents will spend working on a new ticket message.
- Ticket Message Out - The estimated number of minutes agents will spend researching and replying to a ticket message.
- Live Chat Started - The estimated number of minutes agents will spend starting a live chat.
- Live Chat Transferred - The estimated number of minutes agents will chat with a customer that has been transferred to them.

Agents / Administrators

Agents and administrators use SmarterTrack's management interface to interact with users, interact with other agents, and/or set up all aspects of the system. Any employee that communicates with customers or end users via email, tickets or live chats is considered an "agent" and should receive the Agent Role. An agent with the additional "Manager" role

(managers also have the Agent role) will have access to the various Departments and Groups associated with that manager role, and be able to access tickets, live chats, etc. of agents who are part of those Departments and Groups. Administrators, on the other hand, are in charge of managing the SmarterTrack installation, creating Brands and the Departments, Groups and Agents that are part of those Brands, etc. Unlike managers, administrators are generally NOT give an Agent role as they rarely interact with users.

To add new employees or edit existing employee settings, log into the management interface with an administrator account. Select Settings from the Navigator, then select Agents / Administrators in the navigation pane. Any employees associated to your brand will load in the content pane. By default, the Details for the first agent listed will be displayed.

The following options are available in the content pane:

- New - Creates a new agent.
- Edit - Edits the settings for the selected agent.
- Delete - Permanently deletes the selected agent(s).

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

Jump to:

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

Details

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

• Username - The username used to log into SmarterTrack.
• Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow employees to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
• Authentication Domain - When using Active Directory authentication, the domain used for authentication of the login username and password.
• New Password - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
• Confirm Password - When using password authentication, this allows administrators to verify the new password by re-typing it in this field.
• Force password change at next login - When enabled, this setting will force the specified agent or user to change their password the next time they attempt to log in. This allows administrators to create new users or agents with temporary passwords knowing that the user or agent will have to reset it when they first log in. This checkbox remains enabled for the specific user or agent until they log in to the portal or management interface and change their password, at which time the checkbox is disabled. This setting also affects new users or agents created via the SetUsersProperties API call. (NOTE: This setting does not apply to users authenticating via Active Directory.)
• Email Address - The Employee's business email address.
• Display Name - The friendly name used to identify the employee within the SmarterTrack system.
• Display Name for Chat - There are times when agents (as only an employee with an Agent role can use live chat) may not want their real names displayed in the live chat window. For example, they prefer to use a nickname or, for safety reasons, they want to use an alias. Adding in a name here will replace the agent's Display Name when they interact with customers via live chat.
• Time Zone - To specify the time zone, select the appropriate time zone from the list.
• Preferred Language - The language the web interface should be shown in for this employee. The list of languages in the drop-down menu is pulled from the list of

configured Supported Languages.

• Hourly Cost for Reporting - The hourly cost for the employee to work with tickets and live chats. This field is used for cost analysis reporting and is set to 10.00 by default.

Contact Info

Use this tab to input any phone numbers for agents who are connected to, and using, SmarterTrack Communicator (as only an employee with an Agent role can use SmarterTrack Communicator). Up to 4 different phone numbers can be added for any given agent. A website and home address can be entered here as well.

• Website - If the agent has a website, it can be entered here.

• Home Phone - The agent's home phone number.

• Cell Phone - The agent's cell phone number.

• Work Phone - The agent's work phone number.

• Other Phone - The agent's alternate phone number.

• Company - The agent's company.

• Home Address - The physical address of the agent.

Portal Settings

• Avatar - SmarterTrack allows employees to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.

• Avatar Profile - The display picture as provided by the Avatar Provider or one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.

• Subscribe to community posts automatically - Checking this box allows the employee to automatically subscribe to Community threads that they create or post in.

• Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads employees are subscribed to that have had a new reply or the status or type changed.

• Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.

- Portal Signature - Use this field to create a signature that will be displayed in the Portal, such as in Community threads and replies.

Roles

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

To assign a Role to an Employee from Roles tab, simply select the checkbox next to the Role you want to assign. Then be sure to save your changes. By default, any new employee will be assigned the following roles:

- Everyone - cannot be removed
- Registered User - cannot be removed
- Registered User with Verified Email
- Agent

This works for most new employees added as they're being added as agents into SmarterTrack, then assigned to various groups. For specialized roles, such as manager or administrator, those roles would need to be added and any unnecessary role(s) removed. (E.g., removing the Agent role for administrators.) It's good to be aware that SmarterTrack's licensing is based on the number of agents. So, if a specific employee is NOT going to be working with customers or end users, removing the agent role from that employee essentially saves that role for a future employee who will.

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

Groups

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

To view or change an employee's settings for a specific group, simply double-click the

desired row and the Agent-Group Relationship settings will load in a modal window. The following options will be available:

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

- Pull from Queue - By selecting this option, the agent will not receive tickets automatically for the group. The agent will still be a member of the group, so they will be able to see tickets, receive transfers, cherry-pick tickets, etc. but they will not receive any tickets automatically. Instead, they'll have to take tickets from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive ticket assignments.
- Primary Group - Agents in the primary assignment group will be the first to automatically receive tickets via round-robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.
- Secondary Group - Agents in the secondary group will receive automatic round-robin distributions only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.
- Max Tickets - The maximum number of new, active tickets an agent can have at a time for this group. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly

agents work.

• Chat Handling - This option sets the distribution for live chats to agents within the group. Options include:

• Chat disabled - This option excluded the agent from live chat, so they will NOT receive any live chats.

• Pull from Queue - By selecting this option, the agent will not receive live chats automatically for the group. The agent will still be a member of the group, so they will be able to see live chats come in, receive chat transfers, cherry-pick chats, etc. but they will not receive any live chats automatically. Instead, they'll have to take them from the queue. This setting is good for managers or agents-in-training who want to participate in the group but manually take/receive chat assignments.

• Primary Group - Agents in the primary assignment group will be the first to automatically receive live chats as they come in, via round-robin distribution. Agents in this group can include specialists for the group, senior agents or other "go to" individuals for the group.

• Secondary Group - Agents in the secondary group will receive automatic round-robin distribution of chats only after the primary group has met their max ticket limit (either the overall or group-specific ticket limit). Secondary group members act as failover agents for the primary group. Agents in this group can include agents-in-training, part-time agents or others.

• Auto-Inactive - Enter the number of minutes after which an agent is marked as "Inactive" for the particular group. When an agent is inactive in a group, they cannot be assigned tickets, live chats and/or phone calls using SmarterTrack Communicator. (Agents can use Active Groups to go active or inactive in each group of which they are a member. Note: Check the enabled checkbox to enable this setting.

• Hand-off on Auto-Inactive - This setting is used in conjunction with Auto-Inactive. Checking this box will automatically hand off any of an agent's active tickets to another agent if the agent is automatically made inactive in the group.

• Automatically go active upon login - Checking this box will automatically make an agent's status active/available for any live chat or ticket groups they belong to after logging into the management interface. If unchecked, agents will need to manually set their active status across their various groups.

Custom Fields

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

Tickets

Use this tab to edit the following settings regarding the agent's ability to use an external email client or application to handle tickets.

- Copy To Address - Adding a Copy To Address means that any ticket that is assigned to the agent will be copied to this email address as well. This includes every message that comes in from the end user, not only the initial ticket message. The agent can reply from their email application/client, and every ticket reply will be stored in and sent out from SmarterTrack using that department's SMTP settings, keeping the agent's personal email information anonymous. Note: This is enabled by default when an email address is entered in this field.
- Other Reply From Address(es) - This field can be used with the Copy To Address setting to allow additional email addresses to send ticket responses. For example, if an alias is entered in the Copy To Address, each email address within that alias may be entered here to allow all members of the alias to reply to tickets. This is also useful if an agent has forwarding set up on their mailbox. Though the ticket message is received in Mailbox A and forwarded to Mailbox B, the agent can reply from Mailbox B.
- Max Tickets - The maximum number of new, active tickets an agent can have at a time. This field applies to the overall tickets an agent has and is not specific to any groups. Group Max Tickets may still be applied; however, the overall Max Tickets value will override. For example, if the overall Max Tickets is set at 10 and a group's Max Tickets is set at 15, the agent will only be assigned 10 tickets automatically. When configuring this field, take into account the number of groups an agent is part of and the total number of max tickets they should generally receive from those groups. Waiting tickets that become active and follow-ups that become active do not count towards Max Ticket restrictions. Note: Setting a max tickets per agent means that there may still be tickets in the queue unless max ticket values for agents are adjusted based on ticket load. Tickets will only be distributed based on how quickly agents work.

Live Chat

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

- Max Active Live Chats - To change the total number of concurrent live chats that can be participated in, type the appropriate number in this field. By default, this option is set to 1.
- Pop-up new chats automatically - Checking this box will display new live chats in a popup window. By default, this option is enabled.
- Play chat sounds - Checking this box will enable SmarterTrack to play a sound when a chat message is received. By default, this option is enabled.
- Play sound when a chat is queued - Checking this box will enable SmarterTrack to play a sound when a live chat is routed to the queue. By default, this option is enabled.
- Block chat while composing call logs - Checking this box will block live chats from popping up while an active agent is composing a call log.

Roles

Every SmarterTrack user (i.e., anyone using SmarterTrack, from a customer or end user to an administrator) is assigned a role. Roles define permissions and dictate which features the user has access to. In addition, a user's ability to work within SmarterTrack is dictated by the combination of roles that are assigned to the user. Therefore, if a custom role is created, the permissions assigned to all roles for the user may need to be modified to ensure that the custom role's permissions are actually enforced. This is especially true of the Everyone and Agent roles because the Everyone role applies to everyone that interacts with SmarterTrack, both agents and end users, and because the Agent role is necessary for any employee that is going to interact with end users and customers. By default, SmarterTrack has six predefined roles:

- Everyone - Typically a customer or portal visitor. The Everyone role can view and search Knowledge Base articles, and view articles and news items. The Everyone role is assigned to every user within SmarterTrack and cannot be removed.
- Agent - Typically an employee that has access to the management interface and that will interact with customers and end users. An agent is able to view and respond to their own tickets and live chats; create their own call logs and follow-up tasks; manage

knowledge base articles, news items, and canned replies; and view Who's On. It's worth noting that employees with the Agent role can only interact with their own items - they do not have access to other agent's tickets, live chats, etc. In addition, agents are only able to receive tickets for groups that they are members of.

• Manager - Generally an employee that has supervisory capabilities. In addition to having the same permissions as an agent, a manager also has the ability to view all tickets and live chats, for all agents, in any department where they belong to at least one group. Note: Managers must also have the agent role enabled.

• Administrator - An administrator has access to every area of the SmarterTrack installation: the system settings, management interface and database information, all tickets, live chats, call logs and tasks, all Community categories, Brands and reports. Typically, the administrator role is given to one or more Managers, so those employees can can also manage departments, groups, and users, as well as manage SmarterTrack as a whole. Rarely is there an administrator who ONLY has the administrator role, but it does happen, especially in larger installations. Note: For new installations, the initial administrator also has the agent role enabled by default.

• Registered User - A customer, website, or portal visitor that has a registered account. Typically, a registered user can submit tickets and/or live chats and view and search Knowledge Base articles and news items. Registered Users can also have Community privileges such as editing posts, deleting posts, etc. However, system administrators may want to limit the Community access this role has so as to limit the potential for abuse of Community topics.

• Registered User with Verified Email - A customer, website, or portal visitor that has a registered account and has successfully confirmed that the email address provided is valid. Typically, a registered user can submit tickets and/or live chats and view and search knowledge base articles and news items. This role also has Community privileges that can be extended by system administrators as these users have verified their contact email addresses.

To access this section, log into the management interface with an administrator account. Select Settings from the Navigator, then click on Roles in the navigation pane. The default and custom roles associated to your company will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple roles. Roles must be selected before choosing an action from the actions toolbar.
- Role - The name of the role.
- Role Type - Indicates whether the role relates to company employees or users (customers).
- Users - The number of SmarterTrack users assigned to the role.
- Custom Role - Indicates with a checkmark whether the role was created by the administrator to meet specific company needs. Predefined roles will NOT have a checkmark in this column.

The following options are available from the content pane toolbar:

- New - Creates a new role.
- Edit - Allows the administrator to make changes to a role's permissions.
- Delete - Permanently deletes the selected role(s).

Editing Roles

To view the configuration of a specific role, select it by checking its box and then clicking the Edit button. Alternatively, you can double-click the role. The role settings will load in the content window and the following tabs will be available:

Options

Use this tab to specify feature permissions for the features listed. By default, features will have permissions based on the role type, and the items shown will vary based on whether the role is available for Users or Employees. For the Employee role, all feature permissions default to "Full Control". (Items with an asterisk (*) are specifically for the Employee role.)

- Role Name - The name of the role.
- Role Type - To specify whether the role relates to company employees or end users, select the appropriate option from the list.
- KB Articles
- KB Feedback

- Canned Replies
- Community
- News*
- Tickets*
- Tasks*
- Call Logs*
- Live Chats*
- Who's On*
- Reports*
- Distribution*
- Events*
- Survey*
- Users/Organizations*

Feature Permissions

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

- Full Control - Gives the Role complete control over the feature. This includes things like creating new items, editing items, deleting items, etc.
- Modify - Gives the Role the ability to change something in the feature, such as clear Helpfulness Ratings for KB articles.
- Read Only - Gives the Role only the ability to read an item -- not create, modify, edit or delete it.
- None - Removes the Feature from the Role entirely.
- Custom - Allows the administrator to set a granular level of permissions to that feature for a specific Role. For example, if a system administrator wants to limit the ability for the Agent role to transfer things like tickets and live chats, they'd set the Employee Role permissions for Distribution to Custom, then edit the Distribution tab

and remove (uncheck) the ability to "Transfer Work Items" and "Transfer Work Items to Specific Agent". Custom permissions can be set for any feature available in SmarterTrack.

User and Employee Feature Permissions

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

KB Articles

Use this tab to specify knowledge base permissions for this role. Note: This tab is only available if the administrator selects custom KB article permissions in the options tab. Knowledge base permissions cover the following:

- Full Control

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

- Create
- Delete

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

- Scan Broken Links
- None
- Custom

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

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

KB Feedback

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

- Full Control

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

- Create
- Reply
- Report/Moderate
- Read Only

- Report - Portal only
- None

- Report - Portal only
- Custom

- Create
- Reply
- Edit personal
- Edit all feedback
- Delete personal
- Delete all feedback
- Moderate

Canned Replies

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

- Full Control

- View/Insert
- Create
- Edit

- Delete
- Mark Draft
- Change Canned Reply Type
- Change Canned Reply Language
- Modify

- View/Insert
- Create
- Edit
- Mark Draft
- Change Canned Reply Type
- Change Canned Reply Language
- Read Only

- View/Insert
- Custom

- Create
- Edit
- Delete

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

Community

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

- Full Control

- Create Thread
- Edit Thread

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

- Create Thread
- Create Post
- Report
- Custom

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

Employee Only Feature Permissions

News

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

- Full Control

- Create
- Edit
- Delete
- Mark Public
- Mark Private
- Mark Draft
- Mark Reviewed
- Mark for Review

- Scan Broken Links
- Clone
- Modify

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

- Scan Broken Links
- None
- Custom

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

Tickets

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

- Full Control

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

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

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

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

Tasks

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

- Full Control

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

- Create
- Edit
- Change Status

- Change Priority
- Advanced Search
- Task Scheduler
- Read Only

- Advanced Search
- None
- Custom

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

Call Logs

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

- Full Control

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

- Create
- Edit
- Add Attachment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Assistance
- Advanced Search
- Read Only

- Assistance
- Advanced Search
- None
- Custom

- Create
- Modify
- Delete

Live Chats

- Full Control

- Take
- Transfer
- Add Comment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- Manual Event
- Assistance
- View the Queue

- Advanced Search
- Modify

- Take
- Add Comment
- Add Related Item
- Add Task
- Add Time Log
- Add Ticket
- View the Queue
- Advanced Search
- None

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

- View Queue

Who's On

Use this tab to specify Who's On permissions for this role. Note: This tab is only available if the administrator selects custom Who's On permissions in the options tab. Who's On permissions cover the role's ability to "View Who's On Visitors" and interact with them.

- Full Control

- Live Chat
- None
- Custom

- View Who's On Visitors

Reports

Use this tab to specify report permissions for this role. Note: This tab is only available if the administrator selects custom report permissions in the options tab. Report permissions give managers the ability to only grant access to specific reports for the role.

- Full Control

- Create Custom
- Delete Custom
- Edit Custom
- Schedule Email
- Email
- Print
- None
- Custom

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

Distribution

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

- Full Control

- Can do Transfers
- None
- Custom

- Transfer Work Items - limits the role's ability to transfer tickets, live chats, etc. to new groups only.
- Transfer Work Items to Specific Agents - allows the role to transfer tickets, live chats, etc. to both groups and individual agents within the group. Requires "Transfer Work Items" before it can be activated for an agent.
- Manage Agent Status - Limiting this means an agent can NOT mark themselves as

active or inactive in the various groups they're a part of. This would be managed by a user with a role that has this permission, such as a manager or senior agent, if this is restricted for the role.

Events

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

- Full Control

- Create
- Edit
- Delete
- None
- Custom

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

Surveys

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

- Full Control

- Can View
- None
- Custom

- View Summary - Allows the role to see the Survey tab for tickets and live chats. It also will allow agents to see the survey stars on tickets and live chats, and on the User Details Survey and Users/Orgs Survey tabs. It will also allow them to see the Reports > Surveys > By Brand, By Agent, and By Survey survey reports. (IF they have access to the Reports.)

- View Details - Allows the role to view the complete survey results everywhere they see survey stars / survey entries in a grid. (Requires "View Summary" before it can be activated for an agent.) However, they'll only have access to view the Reports > Surveys> By Brand, By Agent, and By Survey reports ONLY if they have permission to view at least one Survey Report.

Users / Organization

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

- Full Control

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

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

- Add Organization Comment
- Add Organization Call Log
- Create Organization Member
- Edit Organization Member
- Delete Organization Member
- Read Only

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

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

Custom Roles

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

Licensing

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

To access licensing information for SmarterTrack, log into the management interface with an administrator account. Select Settings from the Navigator, then click on Licensing . The edition, status, upgrade protection expiration date and license level information will load in the content pane.

The following options are available from the content pane toolbar:

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

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. Select Settings from the Navigator then click on Connected Services n the navigation pane. 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, separate SmarterTrack installation for ticket transferring. This can be useful for those organizations working out of separate geographic locations or across sister-companies where 2 separate instances of SmarterTrack are installed. 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 to record the model numbers of products, and then add that custom field to ticket and live chat templates that SmarterTrack uses. That way, when a customer starts a ticket or live chat, that part number is part of the information that's passed to the agent in the ticket or chat. 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. Select Settings in the Navigator, then click on Custom Fields in the navigation pane. 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 filed 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 select it and click the Edit button. Alternatively, you can double-click the custom field. The custom field details will load in a modal 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 select it and click the Edit button. Alternatively, you can 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

SmarterTrack is a help desk and ticketing system, it is not a mail server. As such, it doesn't have the ability to receive email messages like a mail server, nor can it send ticket responses via email. Instead, SmarterTrack uses existing email accounts and pulls the messages from those accounts in, and then turns them into tickets. Similarly, when a reply is sent, SmarterTrack uses the same email account and sends the response through an external mail server. In this way, SmarterTrack acts more like an email client like Microsoft Outlook: it pulls

messages from a mail server, and then sends messages back out through the same mail server, just like en email client.

This section, then, is where administrators set up the POP and SMTP accounts that are used by each department for pulling messages into the system that are converted into tickets (via POP), then sending out replies to those tickets (via SMTP). There are some other, email-server-like features that can be implemented such as auto-clean rules, black lists for withholding automated system emails, encoding, and more.

The Email area is also used for customizing any system messages as needed, like those sent to customers when a ticket is automatically closed, for password recovery, and more. These system messages are pre-written and, by default, many contain some variables for things like ticket numbers, usernames, links to community posts, and more. However, each of these pre-defined messages can be edited as needed.

To access this section, log into the management interface with an administrator account. Select Settings from the Navigator, then click on Email in the navigation pane. The email settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Default Encoding - To specify the encoding format, select the appropriate option from the list. By default, this is set to Unicode (UTF-8) and is the recommended setting. However, if messages come in from mail servers in different countries who rely on different encoding (e.g., Cyrillic), this setting can be adjusted accordingly.
- 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.
- 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. For more information, see Spool .

• 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.
• 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, 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 so that the address(es) can be used for sending system notifications (the brand's SMTP account) or for ticket replies sent from various departments. To add a new SMTP account, click Add in the content pane toolbar. To edit an existing account, select it and click Edit in the content pane toolbar, or double-click the row. A modal window will display the following options:

• Authentication - SmarterTrack utilizes two forms of email authentication when adding accounts: standard username/password authentication or Microsoft's OAuth2. For any non-Microsoft email service, standard username/password authentication should suffice. However, when using any Microsoft Exchange online service, like Office365/Microsoft365 or Hotmail, you must use Microsoft OAuth2 authentication. (See info below.)
• 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.
• Ignore SSL warnings - Select this to ignore any warnings present if there are issues with the encryption method chosen.
• Make this the default account - Select this to make the account added the default account for the brand.

POP

POP accounts can be used to import tickets from email. To add a POP account, click Add in the content pane toolbar. To edit an existing account, select it and click Edit in the content pane toolbar, or double-click the row. (NOTE: By default, any messages pulled into SmarterTrack via POP are deleted from the mail server. To change this behavior, the "Leave Messages on Server" option MUST be checked.) A modal window will display the following options:

• Authentication - SmarterTrack utilizes two forms of email authentication when adding accounts: standard username/password authentication or Microsoft's OAuth2. For any

non-Microsoft email service, standard username/password authentication should suffice. However, when using any Microsoft Exchange online service, like Office365/Microsoft365 or Hotmail, you must use Microsoft OAuth2 authentication. (See info below.)

• Server - The outgoing POP server name on which the email account resides.

• 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.

• 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.

• 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.

• Ignore SSL warnings - Select this to ignore any warnings present if there are issues with the encryption method chosen.

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

Use of Microsoft OAuth2 Authentication

In 2021, Microsoft started deprecating basic authentication when using their Exchange online

services. As a result, SmarterTrack now offers Microsoft OAuth2 authentication for SMTP and POP connections. (NOTE: OAuth is not supported for SMTP Shared accounts.)

If you are using a Microsoft Exchange online account -- Office365, Hotmail, Live.com or MSN.com email addresses -- You WILL NEED TO USE OAUTH2 FOR AUTHENTICATION moving forward.

The process for using OAuth2 is not that much different than using the standard username/password authentication -- at least from the user's perspective. On the back end, however, it's much different, and much more secure.

- Select Microsoft OAuth2 for your authentication method.
- SmarterTrack will pre-fill the server name. (NOTE: If using an msn.com email address, you will need to change the server name to smtp-mail.outlook.com/pop-mail.outlook.com but the encryption and ports can remain the same.)
- Next, hit the Connect button on the modal. A new window will open that will ask you to log in to your Microsoft account, and to select the type of account you're using. (I.e., Work/school or personal). Please understand that any Exchange online email account is also considered a Microsoft account, so you would log in with your Exchange online account and select whether it's a work/school account or a personal account. (If you're unsure, you will need to contact your IT administrator(s) or someone with knowledge of the type of account that was set up.) From there, you'll be logged in to the Microsoft platform and SmarterTrack will fill in your email address and default the Encryption and Port to those recommended by Microsoft.
- Select any other options by checking the boxes next to them.
- Hit the Save button.

That's pretty much all you have to do. Once the account has been added, you will have the ability to modify things like SSL/TLS encryption and port, if needed.

NOTE: There are some prerequisites to be aware of in Office365. We have a detailed walkthrough of setting up OAuth accounts (Standard and Shared) in our knowledgebase. See How to Setup O365 Accounts in SmarterTrack Using OAuth

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%]
- 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%]

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%]
- 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%]

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%]
- 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%]

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 "Forgot 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. [%TICKETSUBJECT%]
- 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. [%TICKETLIST%]
- 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, start with Events Overview .

This page will focus on system-level events. To access system-level events, log into the management interface with an administrator account. Select Settings from the Navigator, then click on Events in the navigation pane. 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/title given to 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, select it and click Edit in the content pane toolbar. You can also double-click the event and the event settings will load in the content pane. To create a new event, click the New button. For more information on how to create a new event, see Creating New Events .

Agents

This tab displays all events that were created by individual agents. 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.

System 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.
- Show reminder in interface - Checking this box will allow the agent to receive a notifications in the management interface.

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. Select Settings in the Navigator, then click on Forms in the navigation pane. Existing forms will load in the content pane. If no forms have been created, the content pane will be blank. The following buttons will be available:

- New - Allows you to create a new form.
- Edit - Allows you to edit a form.
- Delete - Allows you to delete a form.

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, Form settings will open in the content pane and three (3) tabs appear: Preview, Details, and Fields

Preview

This is where you see how the form looks when it's presented to your end user. Once you've filled out the details and fields you'll use, the Preview tab will give you a good idea of how your customer or end user will see the form when it's sent to them.

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. As a result, the introduction should be very basic. 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, the information 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. Select Settings in the Navigator, then click Language and Locale in the navigation pane. 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

SmarterTrack offers support for nearly 60 different languages, making it easy to communicate with customers on a global level. While adding support for multiple languages for the SmarterTrack interface is a relatively simple process, ensuring all of the supported languages are utilized across custom content, like knowledge base articles, can be a bit more complex as you need to ensure you have articles translated into the languages you want to support. In addition, while SmarterTrack offers translation files for some languages, custom language support may require a customized translation file.

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 - Denotes whether the token is fully translated for all supported languages, or partially translated if a language is missing.

To edit the settings for a specific translatable string, select the token and click the Edit button, or simply double-click the translatable string. To add a new string, click the New button. 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 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 these plug-ins 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. Select Settings from the Navigator, then click on Live Chat in the navigation pane. The live chat settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- 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 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 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.
• 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, select the link and click the Edit button or simply double-click the link. The settings will load in a modal window and the following tabs will be available:

Options

Use this tab to edit how the live chat window appears, the location of the live chat image/tab, how live chats are displayed adn 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.
• 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.
• Position - Determines where the live chat link will be displayed on the website: Bottom Right, Bottom Left, Top Right or Top Left.
• Colors - The colors used across various areas of the live chat window. Note: The text color will automatically adjust to be visible based on the color chosen for the background. In addition, not all Live Chat Link Styles use Colors.

• Background Color - The color used for the header and footer of the chat window, as well as the background color for the window when departments are offline and the ticket submission interface is displayed. By default, this is (255 255 255) RGB or (#FFFFFF) HEX.
• Primary Color - Used to highlight things such as agent name and the submit button during a chat, or the button color for department names when departments are offline and the ticket submission interface is displayed. Primary colors denote agent-side

pieces of live chat for Styles that use the color scheme. (E.g., default, bubble, etc.) By default, this is (0 0 0) RGM or (#000000) HEX.

• Accent Color - Used top highlight things such as the end user's name during a chat. Accent colors denote user-side pieces of live chat for Styles that use the color scheme. (E.g., default, bubble, etc.) By default, this is (0 0 0) RGM or (#000000) HEX.

• 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.

Departments

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. Simply select the department(s) from the list.

Online

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 / Alt Tag - 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. This text is also used as the HTML "Alt" tag for the image being used. As a result, use of this text 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. SmarterTrack offers a number of pre-made chat images that can be used, which can be selected from the dropdown.

However, a business may want to use their own image, and this image can be linked to if it's hosted publicly, or a custom image can be uploaded.

Offline

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 / Alt Tag - 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. This text is also used as the HTML "Alt" tag for the image being used. As a result, use of this text 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 offline. SmarterTrack offers a number of pre-made chat images that can be used, which can be selected from the dropdown. However, a business may want to use their own image, and this image can be linked to if it's hosted publicly, or a custom image can be uploaded.

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 or simply double-click the department. The following tabs will be available:

Options

- New Chats in Portal - The role required to start a live chat 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 ends, 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 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:

- Waiting for Live Chat - A message notifying customers of their estimated wait time to chat with an agent.

- Show position in the queue to user while waiting - When enabled, the following text will be shown to a user who is waiting in the queue: "You are next in line." or "There is X person/There are X people ahead of you." This text is displayed as a header ABOVE the custom message they enter for "Waiting for Live Chat". The default text will is "There is 1 person ahead of you. All agents are currently helping others." As an alternative to

using this checkbox, administrators can include the #QueueCount# variable within the text of their custom "Waiting for Live Chat" message as a way to let users know their position in the chat queue. NOTE: Administrators must use one or the other method -- the checkbox OR the #QueueCount# variable -- or neither. However, only one method can be used at a time.

• Before Live Chat - The title text displayed on the live chat window before a live chat has been started.

• 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. NOTE: If a department is configured to send a survey after a live chat ends, then this message will not be displayed. Instead, the survey's "thank you" text is displayed in its place.

• Not Available Message - The title text displayed on the live chat window when live chat is offline, indicating that live chat is not available.

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 or 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. Select Settings icon from the Navigator, then click on Security in the navigation pane. 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 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.

• 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.
• 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.
• 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.

• 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 an 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

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, click-jacking 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 directing 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, and business owners, a better perspective into customer satisfaction and loyalty. Obtaining customer feedback in a timely and usable 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. Select Settings from the Navigator, then click on Surveys in the navigation pane. 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:

- Survey Name - The name of the survey.
- Offered - The number of times the survey has been offered to customers.
- 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. When creating a new survey or editing an existing one, the following tabs will be available: Preview

This is where you see how the survey looks when it's presented to your end user. Once you've filled out the details and questions you'll use, the Preview tab will give you a good idea of how your customer or end user will see the survey when elect to complete it.

Details

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 Header - The text that appears at the top of the page that's displayed once a user sees the survey.
- 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. Select 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:

- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- 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.)
- Max Messages in Replies - The number of previous messages automatically included in the text of a ticket response. By default, ticket replies include the most recent previous message only. 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. By default, this is set to Always.
- 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.

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. A single signature can be created that's used by all agents, in all groups and departments, or 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, that are different from the agent avatar that set. 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.

To view a specific signature, select the signature and click on the Edit button or 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 log in 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 mto 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, select the agent and click the Edit button or 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 agent's ticket responses are copied to the address in this field.
- Frequency - The frequency with which ticket replies are 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 ticket replies will be copied to a manager. If 1 is entered, every ticket reply is copied.

VOIP

SmarterTrack Communicator is a SIP-compliant voice over IP (VOIP) soft-phone 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 take place with the phone server or soft-phone 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 soft-phone, 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. Select Settings from the Navigator, then click Who's On in the navigation pane. 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 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.
- HTTPS Support - If your SmarterTrack installation is configured with HTTPS -- and it SHOULD be -- 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 or 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.

Automation with Web Services

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

Web services are intended for use by high-volume and automated business environments and hosting companies as they develop procedures to manage their SmarterTrack system and workflow. In addition, the API Documentation assumes a basic understanding of web service technologies and ASP.NET programming.

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

Diagnostics

Administrators will use this section to fine-tune the performance of SmarterTrack. By default, SmarterTrack is set to run optimally on the majority of systems, regardless of how busy the help desk is. However, there may come times when system administrators want to manage these settings and customize the performance of SmarterTrack. Note: These are advanced settings and it is not recommended to change them without understanding the impact of the changes.

Administrators may also use this section to adjust or review the SmarterTrack log files. (SmarterTrack creates daily log files containing information about license activations, SMTP connections, POP connections and errors.)

To access this section, log into the management interface with an administrator account. Then click on the Settings icon . In the Tools area of the navigation pane, click on Diagnostics . The settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- Email Address to Receive Errors - When an email address is entered here, an email will be sent each time an error is written to the Error log.
- SMTP Account - The email address used for sending error reports.
- Heartbeat Interval - The amount of time between communication attempts to the server to refresh tree view counts, reminder popups and counts, live chat popups, and other automatic functions. By default, this option is set to 10 seconds.
- Who's On Interval - The amount of time between communication attempts to the server to refresh visitor information displayed in Who's On. By default, this option is set to 8 seconds.
- Delete Log Files After - The number of days after which the log files are deleted. Deleting log files on a regular basis will minimize the amount of disk space that SmarterTrack uses. By default, log files are deleted after 14 days.
- Enable short query logging - Checking this box will allow SmarterTrack to keep a short log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
- Enable full query logging - Checking this box will allow SmarterTrack to keep a very detailed log of every query executed. This setting is useful for identifying database-related issues. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
- Enable lock tracing - Checking this box will allow SmarterTrack to keep a detailed log about objects being cached in server memory. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.
- Enable cache tracing - Checking this box will track all system level locks to identify points of conflict in the software. Note: Because of the performance impact of enabling this setting, SmarterTools recommends enabling it only when requested by a support agent.

Administrators can use the Self Diagnostic button in the content pane toolbar to test the SmarterTrack server for errors. SmarterTrack will perform a test and display the results in a popup window. SmarterTrack's self diagnostic tool will review a variety of different settings to

help administrators troubleshoot potential issues. For example, the tools will check file permissions, internet connectivity, folder permissions and more.

Current Thread Status

Use this tab to start and stop background threads. Changing the status of background threads may disable certain areas of the application and will affect functionality. For this reason, it is not recommended to change the status of background threads unless instructed to do so by the SmarterTools Support Department for debugging purposes. A number appears in the tab itself to show the total number of threads available to manage.

Below is a list of each thread, what it controls and the consequences of disabling the thread.

- Auto-Inactive Thread - This thread controls automatically sets an Agent to an "inactive" status, and will then hand off tickets and/or live chats. If it's disabled, Agents will not be automatically set to an inactive status.
- Auto-Purge Deleted Items Thread - This thread controls automatically purging deleted tickets, chats, call logs, tasks, canned replies, news items, KB articles, groups, departments and users every 90 days. If it is disabled, deleted items will not be automatically purged.
- Call Log Watcher Thread - This thread watches the call log and will automatically delete call logs older than 7 days. This thread also checks to make sure the database is not being upgraded when it runs, and that an update of SmarterTrack is not running. If it is, then this thread will run after these updates are complete. If it's disabled, call logs are not automatically deleted.
- Chat Manager Thread - This thread calculates chat wait times, auto assigns live chats, removes ended/abandoned chats and automatically deletes chats older than 7 days. If it is disabled, therefore, wait times would not be captured, chats would not be auto-assigned, and abandoned/ended chats would not be removed.
- Cleaner Thread - This thread automatically cleans out various folders: Raw Content, Call Recording, Temp, Failed Emails, Logs, User Handshakes, Orphaned Ticket Attachments and Zip Files. Essentially, any folder that holds metadata. If it's disabled, none of that information would automatically be purged, and the folders would grow in size and, possibly, compromise total disk space.

• Email Import (POP) Thread - This thread turns .eml files in the email folder that are pulled in from any POP accounts that are set up into actual tickets. Therefore, if it's disabled, tickets would no longer be created from any .eml files imported via any POP accounts.
• Email Report Thread - This thread controls the automatic sending, via email, of any Report. If it's disabled, therefore, no Reports -- scheduled or otherwise -- would be sent out.
• Event Processing Thread - This thread controls any system-level events such as version updates, license renewals, etc. It also controls ticket and live chat counts, and knowledge base article status. (E.g., when they go stale.) This thread also checks to make sure the database is not being upgraded when it runs, and that an update of SmarterTrack is not running. If it is, then this thread will run after these updates are complete. If it's disabled, therefore, ticket and live chat counts wouldn't work, KB article status isn't checked, etc.
• Indexing Thread - This thread automatically creates a list of indexable strings that are used when using regular and advanced search. If it's disabled, those searchable strings will not be created, essentially crippling SmarterTrack's search features.
• POP Download Thread - This thread handles the importing of .eml files via POP and running POP imports from the various accounts that are set up. If it's disabled, therefore, POP importing would stop.
• SMTP Delivery Thread - This thread manages the Spool, sending ticket replies using the SMTP accounts that are set up and then clearing the Spool after messages are sent. If it's disabled, therefore, ticket replies will not be sent.
• Task Watcher Thread - This thread watches adn runs Tasks and also deletes completed Tasks that are older than 7 days. If it's disabled, this does not occur.
• Ticket Watcher Thread - This thread watches Tickets and runs checks for auto-closing tickets, auto-locking tickets, auto-deleting of tickets, ticket rebalance rules and ticket assignments. If it's disabled, therefore, tickets will not auto-assign, rebalancing will not work, and any other automatic ticket tasks will not run.
• Task Scheduler Thread - This thread runs the Task Scheduler and manages any recurring Tasks. If it's disabled, therefore, this does not occur.

Log Files

SmarterTrack logs a number of different items, and these logs can be used to help troubleshoot issues. Generally, they'll be used by SmarterTools support, but administrators who are familiar with how SmarterTrack runs can also use these logs when problems arise. For example, if tickets stop importing for a particular department, the ticket import log and/or the POP log can be accessed to help find out why. Log files are generally kept for 30 days, but they can be manually deleted as needed. The following columns are available:

- Checkbox - Use these boxes to select multiple log files. Log files must be selected before choosing an action from the toolbar.
- File Name - The name of the log file.
- Date - The date the log file was created.
- Size (bytes) - The size of the log file in bytes.

To view a specific log file, select the log and click the Open button or simply double-click the file and it will load in a pop-up window. A number will appear on the tab itself that displays the total number of log files that are available to view.

External Providers

Administrators with programming knowledge can extend the functionality of SmarterTrack through the use of external providers. By integrating external providers into SmarterTrack, companies can do the following and more:

- Integrate their login system to LDAP.
- Copy the user's ID that the billing system uses into a custom field in SmarterTrack for easy reporting.
- Show and hide custom fields based on the department a user has chosen.
- Redirect any tickets that have certain custom field values or keywords to an escalation department.

To access this section, log into the management interface with an administrator account. Select Settings from the Navigator, then click on External Providers in the navigation pane. The settings will load in the content pane and the following tabs will be available.

NOTE: For technical details, refer to the examples found in the SmarterTrack External Provider Technical Documentation .

Options

Use this tab to enable external providers. For each external provider enabled, the corresponding tab will become active:

- Enable login provider - Checking this box will enable the login provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable registration provider - Checking this box will enable the registration provider and allow the administrator to configure settings on the corresponding external provider tab.
- Enable custom field provider - Checking this box will enable the custom field provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable ticket provider - Checking this box will enable the ticket provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable live chat provider - Checking this box will enable the live chat provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable user information provider - Checking this box will enable the user information provider and allow the administrator to configure the settings on the corresponding external provider tab.
- Enable events provider - Checking this box will enable the events provider and allow the administrator to configure the settings on the corresponding external provider tab.

Login

A login provider can be implemented that allows SmarterTrack to query existing systems for user login, authentication, and creation. Every time a user logs in or returns to the site with a login already stored in their cookies, this provider is called. Administrators can use the built-in provider or an external web service. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.
- Forgot Password URL - The URL used to recover password information for SmarterTrack users.
- Custom Login URL - The URL to which all users will be redirected in order to login. When a URL is entered here, users will be redirected to the specified site instead of seeing the standard login modal.
- Default Role for Users - To specify whether users are considered registered or anonymous after logging in, select the appropriate option from the list. Note: If users are considered anonymous, the administrator will have to manually grant the user role to new users. For this reason, it is recommended to select registered users as the default role.
- Mark email addresses as verified - Checking this box will automatically verify that email addresses for users are valid.
- Enable single sign-on cookies from other sites - Checking this box will allow the web service to accept session cookies from another site.

Registration

A registration provider can be implemented that allows SmarterTrack to work with existing systems for user registration. When a user registers in the existing system, this provider can be called. Administrators can use the built-in provider or an external web service. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

Custom Fields

A custom field provider can be implemented to allow a custom set of fields to be displayed when creating tickets and live chats. The custom field provider is called when a ticket or live chat is first created and allows the administrator to add or pre-fill fields based on the user's login credentials or other information. Administrators can use the built-in provider or an external Web service. If an external Web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

Ticket

The ticket provider is called right before a ticket is started. It can be implemented to allow the system to redirect the ticket to another department, set other customer fields (like a customer ID in an external billing system), or reject the creation of the item. Administrators can use the built-in provider or an external web service. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

Live Chat

The live chat provider is called right before a live chat is started. It can be implemented to allow the system to redirect the live chat to another department, set other customer fields (like a customer ID in an external billing system), or reject the creation of the item. Administrators can use the built-in provider or an external web service. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

User Information

The user information provider can be implemented to automatically pull information from an external database and display the information in the Communication tab of tickets. A business can use this provider to display important customer information (recent purchases, licensing information, number of past tickets, etc.) so that agents have all available details when viewing tickets. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

Events

An events provider can be implemented to automatically update third-party software and databases when agents perform specific actions. Administrators can use the built-in provider or an external web service. If an external web service is chosen, the following fields are available:

- Web Service URL - The URL to the web service.
- Web Service Password - The password used to authenticate the web service.

Spool

All incoming and outgoing SmarterTrack messages are processed through the spool. If your email server is down, messages in the spool will retry at regular intervals until it comes back up. Administrators can manage incoming and outgoing messages in the spool, retry failed messages, delete failed messages or view the raw content of any message.

To manage the spool, log into the management interface as an administrator. Select Settings from the Navigator, then click on Spool in the navigation pane. The spool contents will load in the content pane. Two tabs are available for toggling between the Outgoing spool and Incoming spool. The outgoing spool is for messages sent from SmarterTrack. The incoming spool is for messages imported into by SmarterTrack.

The following options are available from the content pane toolbar:

- Raw Content - Allows an administrator to view the raw content of the selected message, including the message header. Double-clicking on a spool item also displays the raw content of the message.
- Actions

- Select All - Selects all messages in the spool.
- Retry - Retries the failed message(s).
- Delete - Permanently deletes the message(s) from the system.
- Sort - Messages in the spool can be sorted in ascending or descending order based on things like Size, Time in Spool, etc.

Events

Events Overview

SmarterTrack can detect events as they occur, generate messages for those events,and deliver the messages to administrators and agents that need the information. For example, agents can receive notifications when they receive a new ticket or supervisors can be notified when a customer completes a survey. Using Events in SmarterTrack, administrators and agents don't have to query for the status of the items in the system—they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterTrack: agent-level events and system-level events:

- Agent-level events are created by agents and they are specific to each agent's role and permission level within SmarterTrack. For more information on agent-level events, please see My Events .
- System-level events can only be set by administrators and cover both agent- and system-level items such as SMTP errors, idle times and more. For more information on system-level events, please see Events .

The Events folder, which can be found in the Settings folder of the Help for Users and Administrators section, can be used for more information on creating new events and what event categories and types are available. For each event category (the feature the event is related to: Call Logs, Knowledge Base, Tickets, etc.) there is a corresponding document detailing the types, conditions and actions available. Actions can be created that include any default text you want to include, as well as any available variables. Default variables are denoted using #VARIABLE_NAME#. (NOTE: These are different than the variables used for Email templates, which are noted using %VARIABLE_NAME%.)

My Events

When clicking My Events all events that are created by an individual agent are displayed for the Agent. The following items are displayed for My Events:

- Name - The Event's friendly name.
- Enabled - When checked, that Event is enabled. When unchecked, the Event is disabled.
- Category - The primary category the Event was created for. (E.g., Tickets, Call Logs, etc.)
- Event Type - The type of Event created. (E.g., Ticket Count for Department, Task Deleted, etc.)
- Conditions - A list of the conditions that need to be met for the Event to fire.
- Actions (...) - A list of the actions to be taken when the Event fires.

System Administrator Events

When viewing Events as a system administrator, there is a bit more to it. First of all, system administrators can create their own events. In addition, system administrators can view any events created by agents. As such, they have different tabs: Global, which shows all events that the system administrator has created, and Employees, which displays all events that have been created by individual agents. Regardless, the following items are displayed:

- Name - The Event's friendly name.
- Enabled - When checked, that event is enabled. When unchecked, the event is disabled.
- Owner - Only displayed on the Employees tab, this is the agent who created the Employee event.
- Category - The primary category the event was created for. (E.g., Tickets, Call Logs, etc.)
- Event Type - The type of event created. (E.g., Ticket Count for Department, Task Deleted, etc.)
- Conditions - A list of the conditions that need to be met for the Event to fire.
- Actions (...) - A list of the actions to be taken when the event fires.

Managing Access to Events

Although there are many useful implementations for SmarterTrack's events systems, some companies may wish to disable it. Alternatively, they may want to disable it just for agents, but leave it active for managers and/or system administrators. Using the Roles system in

SmarterTrack, this is very easy to do. Therefore, to prevent agents from accessing and using the events system, the system administrator just needs to edit the proper Role permissions.

Follow these steps to disable agent access to the Events system for Agents:

- Log in to the SmarterTrack management interface as a System Administrator.
- Select Settings from the Navigator.
- Click Roles in the navigation pane. A list of available roles will load in the content pane.
- Select the desired Role (in this example, Agent) and click the Edit button. (Alternatively, you can double-click on the Role name.)
- The Options tab is displayed.
- In the Events field, select Custom from the list. This will enable the Events tab.
- Click the Events tab.
- To disable the Role from using the Events system, uncheck the Create and Edit My Events checkbox. This prevents that Role from being able to create any Events for Agents that have that Role.
- Click Save .

That's it: now agents are not able to create events. To disable this for managers and/or system administrators, you do the same steps except in Step 4, you'd choose the Manager or Administrator role.

Creating New Events

To add a new event as an agent, select Settings in the Navigator, then click My Events in the navigation pane. Click the New in the content pane toolbar.

To add a new event as a system administrator, select Settings in the Navigator, then click Events in the navigation pane. Click New in the content pane toolbar. Note: Only administrators can add system-level events.

This will open a new event window with the following fields:

- Name - The friendly name of the event.
- Category - The feature to which the event pertains (Tickets, Survey, Who's On, etc.)

- Type - The type of action that will cause the event to fire. The types seen are based on the Category chosen.

After completing the fields in the new event window, the following tabs will load in the content pane:

Conditions

Use this tab to further customize the event as needed. Depending on the event category and type selected, different event condition criteria will be available. For more information on the various event action criteria, see the corresponding event category page in the navigation pane of this help document. In general, the following settings are available:

- Name - The name of the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.

Actions

Use this tab to determine the action that should be triggered when the event occurs. For new events, click Add Action in the content pane toolbar. Depending on the event category and type selected, different action options will be available. Furthermore, for each action chosen, there will be various settings for further configuration. For more information on the various event actions, see the corresponding event category page in the navigation pane of this help document. In general, the following settings are available:

- Action - The action that occurs when an event is triggered.
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list. For example, if you set a maximum frequency of 15 minutes for an event that means the event will only fire once in that 15-minute period regardless of how many times the event conditions are met.

Manual Events

Manual events allow agents and managers to add multiple actions to a single event, then trigger the event whenever they want versus waiting for the system to execute them automatically. For example, agents may want to transfer a ticket to another department, send

a canned reply to the customer, adjust the custom fields in preparation to track the ticket, and SMS the agent that will receive the transferred ticket. Instead of the agent having to perform all of these actions separately, manual events can make all this happen with just one click.

To create a manual event, after clicking the New button on the events page, naming your event and selecting its category, choose "Manual XX Event" as the Event Type , where "XX" is the category name. (E.g., Manual Call Log Event.) You then set your Conditions and Actions accordingly.

Active Group Events

This event category is only available to system administrators.

Administrators can receive notifications or automate actions based on the following agent status events:

- Agent Auto-Inactive
- Agent Status Unavailable
- Agent Status for Live Chat Changed
- Agent Status for Tickets Changed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent - The agent whose status changed.
- Status - The status that will trigger the event.
- Is Unavailable - The AFK status that will trigger the event.

Actions

Depending on the event type selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Call Log Events

Administrators and agents can receive notifications or automate actions based on the following call log events:

- Call Log Attached to Ticket
- Call Log Created
- Call Log Deleted
- Call Log Detached from Ticket
- Call Log Modified
- Call Log Time Log Created
- Manual Call Log Event

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Subject - The words that will trigger the event if found within the call log subject.
- Acting Agent - The agent that added a comment to the call log.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- Agent Assigned - The agent assigned to the call log.
- Phone Number - The phone number that will trigger the event.
- Name - The name that will trigger the event.
- Email Address - The email address that SmarterTrack uses to send email.
- Incoming Call - The type of call that will trigger the event. Note: If the type of call is an incoming call, type "true" in the field. If it is not, type "false" in the field.
- Start Date - The start date of the call.
- End Date - The ending date of the call.
- Description - The words that will trigger the event if found within the description of the call log.
-

NOTE: There may also be some Custom Fields that appear in the list of Conditions that are not described above.

Actions

Note: Event criteria based on any custom fields the administrator has established may also be available.

Depending on the event type selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Transfer Call Log - Transfers the call log to the Group and Agent specified
• Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Community Events

Administrators and agents can receive notifications or automate actions based on the following Community event:

• New Community Thread Created
• New Reported Abuse

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Thread Type - The Type of thread that triggers the event.
- Display Name - The display name of the user that triggers the event.
- User's Email - The email address of the user that triggers the event.
- Type - The activity in the thread that triggers the event.
- Type of Abuse - The type of abuse in the thread that triggers the event.
- Reported By - The reporter's display name that triggers the event. Note: If the user's display name is not set this will revert to the username.
- Email of Reporter - The email address for the reporter that triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Subscribe to Thread - Subscribes you to any thread based on the Conditions set. This setting works in conjunction with the "Email summaries of subscribed community posts" setting available in My Preferences. (Which is on the Portal Settings tab.) If this

setting is enabled, and this event action is used, you will receive email summaries for any thread that's subscribed to as a result of the event.

• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Knowledge Base Events

Administrators and agents can receive notifications or automate actions based on the following knowledge base events:

• KB Article Created
• KB Article Deleted
• KB Article Flagged for Review
• KB Article Modified
• KB Article Reviewed
• KB Article Stale
• KB Feedback Abuse Reported
• KB Feedback Approved
• KB Feedback Blocked
• KB Feedback Created
• KB Feedback Deleted
• KB Feedback Edited
• Manual KB Event

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• Day of Week - The day(s) of the week during which the event occurs.
• Agent - The agent that modifies or creates articles.

- Folder - The folder in which the knowledge base article is saved.
- Article Title - The words that will trigger the event if found within the article title.
- Keywords - The words that will trigger the event if listed as article keywords.
- Body Text - The words that will trigger the event if found within the body of the article.
- Marked as Draft - The article status that will trigger the event.
- Marked as Private - The article status that will trigger the event.
- Flagged for Review - The article status that will trigger the event.
- Feedback Text - The full text of the feedback.
- Feedback Display Name - The friendly name of the user who left the feedback.
- Feedback IP Address - The IP address of the user who left the feedback.
- Feedback Email - The email address associated with the user who left the feedback.
- Feedback Moderated - A true/false value for whether the feedback has been moderated.
- Feedback Abuse Reports - The number of abuse reports for the user who left the feedback.
-

Actions

Depending on the event selected, the following actions are available:

- Alter Item Properties - Allows you to automatically change an article's Draft, Public/Private and Review status.
- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .

- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Live Chat Events

Administrators and agents can receive notifications or automate actions based on the following live chat events:

- Live Chat Attached to Ticket
- Live Chat Comment Added
- Live Chat Count for Agent
- Live Chat Count for Department
- Live Chat Count for Group
- Live Chat Deleted
- Live Chat Detached from Ticket
- Live Chat Ended
- Live Chat Idle
- Live Chat Incoming Message
- Live Chat Message Out
- Live Chat Started
- Live Chat Time Log Created
- Live Chat Transferred
- Manual Live Chat Event

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all live chats in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk. While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" chats, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 minutes." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available. In addition, there may be one or more custom fields displayed, if any have been set up.

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Average Idle Minutes - The average number of minutes a live chat was idle before the event is triggered.
- Longest Idle Minutes - The longest a live chat is idle before the event is triggered.
- Idle Minutes - The number of minutes a live chat is idle before the event is triggered.
- Acting Agent - The agent that added a comment to the live chat.
- Old Department - The department the ticket was transferred from.
- Old Group - The group the ticket was transferred from.
- Old Agent Assigned - The agent who previously "owned" the ticket prior to its transfer.
- Department - The department that will trigger the event.

- Group - The group that will trigger the event.
- Last Agent to Leave - The last agent to go unavailable in the chat group.
- Agent Assigned - The agent assigned to the live chat.
- Open Date - The date the live chat was initiated.
- Customer Name - The name of the customer.
- Customer Username - The customer's username.
- Customer Email - The customer's email address.
- Question - The words that will trigger the event if found within the text of the chat.
- Message - A word or group of words within a chat message that will trigger the event.

- Customer IP - The customer's IP address.
- Language - The language that will trigger the event.
- Messages Sent - The number of messages sent during the live chat.
- Messages Received - The number of messages received during the live chat.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event selected, the following actions are available:

- Add System Message - This will add a message in the chat window that is separate from a user or agent response message, so it is obvious it is a message originating from the SmarterTrack system.
- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- End Chat - Ends the chat by the agent.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

• Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Transfer Live Chat - Transfers the chat to the Group and Agent specified
• Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

POP Events

This event category is only available to system administrators.

Administrators can receive notifications or automate actions based on the following POP events:

• POP Connection Failed
• POP Download Failed
• POP Import Failed
• POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Server Name - The name of the server that SmarterTrack failed to connect to.
- Server Port - The port that SmarterTrack attempted to connect to on the server.
- Login Username - The username used to authenticate with the server.
- SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.
- Customer Email - A customer's email address that triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

SMTP Events

This event category is only available to system administrators.

Administrators can receive notifications or automate actions based on the following SMTP events:

- SMTP Connection Failed
- SMTP Delivery Failed
- SMTP Final Delivery Failed
- POP Login Failed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- SMTP Server - The name of the server that SmarterTrack failed to connect to.
- Server Port - The port that SmarterTrack attempted to connect to on the server.
- Email Address - The email address that SmarterTrack uses to send email.
- SSL - The type of connection required to connect to the server. Note: If the server requires an SSL connection, type "true" in the field. If it does not, type "false" in the field.
- Requires Authentication - The authentication required connect to the server. Note: If the server requires authentication, type "true" in the field. If it does not, type "false" in the field.
- Customer Email - The customer's email address.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Survey Events

Administrators and agents can receive notifications or automate actions based on the following survey event:

- Survey Answered

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Survey Name - The survey that triggers the event.
- Survey Rating - The rating that triggers the event.

Actions

Depending on the event selected, the following actions are available:

• Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
• Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Task Events

Administrators and agents can receive notifications or automate actions based on the following Task events:

• Manual Task Event
• Task Created
• Task Deleted
• Task Due
• Task Modified
• Task Started

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• Day of Week - The day(s) of the week during which the event occurs.

- Subject - The words that will trigger the event if found within the task subject.
- Acting Agent - The agent that added a comment to the ticket.
- Agent Assigned - The agent that is assigned the task.
- Old Agent Assigned - The agent previously assigned the task.
- Status - The task status that will trigger the event.
- Priority - The priority level that will trigger the event.
- Related Item - A related email ticket, live chat or call log.
- Description - The words that will trigger the event if found within the description of the task.
- Start Date - The start date of the task.
- Due Date - The due date of the task.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Create Task - Creates a new task with the customized Subject, Description, Priority and Status specified.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency

setting.

• Set Task Priority - Sets the task priority (low, normal, high, urgent). This is generally used in conjunction with another action.

• Set Task Status - Sets the task status (Under Consideration, In Progress, On Hold, In Review, Completed, Rejected, Approved). This is generally used in conjunction with another action, such as "Send Canned Reply".

• Transfer Task - Transfers the task to the Agent specified

• Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

• Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

Ticket Events

Administrators and agents can receive notifications or automate actions based on the following ticket events:

• Manual Ticket Event

• Ticket Close Requested by User

• Ticket Commend Added

• Ticket Count for Agent

• Ticket Count for Group

• Ticket Count for Department

- Ticket Created
- Ticket Deleted
- Ticket Duration
- Ticket Followed Up
- Ticket Follow-up Due
- Ticket Follow-up Scheduled
- Ticket Form Completed
- Ticket Form Sent
- Ticket Idle
- Ticket Messages Received
- Ticket Messages Sent
- Ticket Priority Changed
- Ticket Status Changed
- Ticket Time Log Created
- Ticket Transferred

Regarding Idle Events

Idle Events are very resource intensive as, when an Idle Event fires, it has to cycle through all tickets in the system. Therefore, it's a good idea to create no more than six (6) Idle Events for your help desk. While Idle Events are the most intensive, all events have an impact on the system, so be pragmatic and systematic when planning out what events to use and how to use them. A properly-running help desk should have no more than 24 events in total set up to cover all scenarios.

In addition, in those circumstances where customers want to set IDLE events for "waiting" tickets, the best way to set these is to use a conditional wait time versus an absolute value. For example, rather than set the event to fire if a wait time is 5 minutes, set it to fire if the wait time is "between 5 and 15 minutes." This is a more efficient way of setting up the event and will ensure it fires off as intended.

Conditions

Depending on the event selected, the following event criteria are available:

• Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
• Event Type - The event that triggers the action.
• Time of Day - The time frame during which the event occurs.
• During Holidays - Use this to designate this Event to only perform its Actions during a Holiday that's set in the Brand's settings for a particular Department. (Or for the Brand, depending on how the Department is set up.)
• Outside Business Hours - Use this to designate this Event to only perform its Actions outside the Business Hours that are set in the Brand's settings for a particular Department. (Or for the Brand, depending on how the Department is set up.) NOTE: This setting includes holidays by default. If you only want to use this Event "Outside Business Hours" and NOT on holidays, the During Holidays condition should be set to False in addition to Outside Business Hours being set to True. This will exclude this Event from firing outside your designated business hours on a designated holiday.
• Day of Week - The day(s) of the week during which the event occurs.
• Duration Minutes - The number of minutes since the ticket has been submitted before the event is triggered.
• Acting Agent - The agent that added a comment to the ticket.
• Old Department - The department assigned to the ticker prior to transfer.
• Old Group - The group assigned to the ticket prior to transfer.
• Old Agent Assigned - The agent assigned to the ticket prior to transfer.
• Active Tickets - The total number of tickets with an Active status.
• Waiting Tickets - The total number of tickets with a Waiting status.
• Department - The department that will trigger the event.
• Group - The group that will trigger the event.
• Agent Assigned - The agent assigned to the ticket.
• Customer Email - The customer's email address.
• Subject - The words that will trigger the event if found within the ticket subject.
• Priority - The priority level that will trigger the event.
• Status - The ticket status that will trigger the event.
• Idle Minutes - The number of minutes a ticket is idle before the event is triggered.
• Follow-up Scheduled - Whether or not a follow-up has been scheduled for the ticket.

- Follow-up Due Minutes - The number of minutes prior to the due date and time that will trigger the event.
- Follow-up Past Due Minutes - The number of minutes after the due date and time that will trigger the event.
- Pinned to Agent - The ticket status that will trigger the event.
- Messages Sent - The total number of outgoing tickets that will trigger the event.
- Messages Received - The total number of incoming tickets that will trigger the event.
- Validation Hash - Based off the ticket's VerificationHash, this is used to verify the ticket when it's sent outside SmarterTrack. For example, when a link to the ticket is included in a reply or users are sent a ticket list.
- Display Name - The "friendly" name of the person submitting the ticket.
- Email - The email address of the person submitting the ticket.

Note: Event criteria based on any custom fields the administrator has established may also be available.

Actions

Depending on the event type that is selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Log to File (once per item) - Logs an action to a text file. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Offer Survey - Initiates a survey to the end user. Note: Surveys will only be sent for closed tickets if there is at least one incoming message present.
- Pin Ticket to Agent - Pins the ticket to the assigned agent.
- Send Canned Reply - Automatically sends a specific canned reply.

• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.
• Send Email (once per item) - Sends an email to a set of recipients. This occurs once per each instance of the event firing and can be managed using the max frequency setting. For example, if six tickets trip an email ticket IDLE event, one email is sent for each ticket that fires the event.
• Send Form - Allows a form to be sent to the ticket sender.
• Send Reply to Ticket - Automatically sends an email reply to the ticket. The reply is customized based on the event.
• Set Ticket Priority - Sets the ticket priority (low, normal, high, urgent). This is generally used in conjunction with another action.
• Set Ticket Status - Sets the ticket status (active, waiting, closed, closed and locked). This is generally used in conjunction with another action, such as "Send Canned Reply".
• Transfer Ticket - Transfers the ticket to the Group and Agent specified
• Unpin Ticket from Agent - IF the ticket is pinned to an Agent, the pin is removed so the ticket will be handled via whatever Distribution Rules are set.
• Use Default Notification Profile for User - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use Default Notification Profile for User (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of the Default Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile (once per item) - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once per each instance of the event firing and can be managed using the max frequency setting.

User Events

Administrators and agents can receive notifications or automate actions based on the following survey event:

- New User Registered

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Username - The username of the new user which triggers the event.
- Email Address - The email address of the new users which triggers the event.
- Full Name - The full name of the new user which triggers the event.
- Phone Number - The phone number of the new user which triggers the event.
- IP Address - The IP Address of the new user which triggers the event.
- Brand - The brand the new user belongs to which triggers the event.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired.

- Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

Who's On Events

Administrators and agents can receive notifications or automate actions based on the following Who's On events:

- Online Activity
- Online Visitor Purged
- Online Visitor Removed

In addition to the events listed above, administrators can receive notifications or automate actions on the following Who's On events:

- Online Visitor Purged
- Online Visitor Removed

Conditions

Depending on the event selected, the following event criteria are available:

- Name - The friendly name for the event. Note: The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.
- Event Type - The event that triggers the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Acting Agent - The agent that added a comment to the ticket.
- Department - The department that will trigger the event.
- Group - The group that will trigger the event.
- IP Address - The IP address that will trigger the event.
- Host Name - The host name that will trigger the event.
- Host Domain - The host domain that will trigger the event.
- Session Start Time - The time frame during which the customer visited the website or portal.

- Hits - The number of times a page is hit before triggering the event.
- Duration Minutes - The number of minutes the visitor has been on the website or portal.
- Idle Minutes - The number of minutes a ticket sits idle before the event will trigger.
- Country - The geographic location of the visitor that will trigger the event.
- Region - The geographic location of the customer that will trigger the event.
- Language - The default browser language of the user that will trigger the event.
- Browser - The Web browser that will trigger the event.
- Operating System - The operating system that will trigger the event.
- Live Chat Status - The live chat status that will trigger the event.
- Initial Page - The Web page that will trigger the event if viewed at the beginning of the customer's session.
- Initial Virtual Page - The virtual page that will trigger the event if viewed at the beginning of the customer's session.
- Initial Page Title - The title of the initial page.
- Initial Referrer - The Web page that the user was on prior to coming to site that will trigger the event.
- Current Page - The Web page that will trigger the event.
- Current Virtual Page - The virtual page that will trigger the event.
- Current Page Title - The title of the current page the visitor is browsing.

Actions

Depending on the event selected, the following actions are available:

- Call Web Page - Calls a web page that you specify, and that page can execute specific actions, queries or other methods based on whatever is coded on the page. For example, calling a web page that then initiates adding a task to a third-party task management application.
- Log to File - Logs an action to a text file. This occurs once based on the max frequency set, regardless of how many times the event is fired.
- Notify Events External Provider - Calls an external provider that is created by the customer. For more information, see External Providers .
- Purge From List - Purges a visitor's entry from the Who's On list.

• Remove From List - Removes a visitor's entry from the Who's On list.
• Send Email - Sends an email to a set of recipients. This occurs once based on the max frequency set, regardless of how many times the event is fired. For example, if six tickets trip an email ticket IDLE event, only one email is sent.
• Send Live Chat Invitation - Send a live chat invitation to the recipient on the portal or company website. This occurs once based on the max frequency set, regardless of how many times the event is fired.
• Use My Notification Profile - Uses any custom email addresses and/or SMS addresses that are used as part of a personal Notification Profile. This occurs once based on the max frequency set, regardless of how many times the event is fired.

SMARTERTOOLS END USER LICENSE AGREEMENT

This End User License Agreement ("EULA") is between SmarterTools, Inc. ("SmarterTools") and the License holder ("You") of the software product this EULA accompanies ("Software"). It is important to read and understand all the terms, limitations, and conditions contained in this EULA prior to installing and using the Software because they affect how You may use the Software and Your rights under this License. By explicitly accepting this EULA by installing, copying, downloading, accessing, or otherwise using the Software, You agree to be bound by the terms of this EULA. If, prior to using or installing the Software, You decide that You are unable or unwilling to agree to the terms of this EULA, promptly and completely uninstall and destroy any electronic copies of the Software and accompanying items in your possession.

This EULA shall apply to:

- This Software.
- Future Versions of this Software.
- Updates, add-ons, and plug-ins to this Software, as may be made available by SmarterTools from time to time.
- Features selection(s), including, but not limited to, "Professional," "Enterprise" and "Free" editions of the Software, and maximum allowed numbers of users, profiles, devices, email addresses, domains, web sites, or agents ("level").
- Services, support, advice, and recommendations related to this Software that may be made available by SmarterTools on the internet, on websites, in the Software documentation, via email or by telephone.
- Any and all Technical Support Services offered by SmarterTools in connection with the Software.

DEFINITIONS

The following definitions shall apply for the purposes of this EULA:

- "Dedicated Hosting" shall refer to an individual, group, or organization ("Dedicated Host") that maintains a physical server device that is wholly or, in the case of Virtual Private Servers ("VPS"), a dedicated portion of a physical server device that is sold, leased, or otherwise made available to a third party; whether or not a fee or other

compensation is exchanged; and in which the third party has authorization and/or access to the activation areas of the software and/or to system administration functions.

• "Effective Date" shall be the date upon which this EULA was accepted by You.

• "Elastic Computing" shall refer to a user's ability to install software, create websites or instantiate a database on one or more Workers that can then be given incremental CPU cycles or percentages, memory (RAM) allocations, and/or physical disk space and bandwidth allocations that can all, then, be managed (increased or decreased) separately and on an as needed basis.

• "License" shall refer to the revocable, non-exclusive, non-transferable license to use the Software in accordance with the terms and conditions of this EULA. The term License applies to purchased and non-purchased Licenses, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable and/or activate the software or certain Features Selection(s) in the Software (collectively, "License Keys").

• "License Key" shall apply to the alphanumeric combination entered/applied upon installation and used to access Feature Selections. License Keys are delivered to the owners of purchased (paid for) Licenses and to those who may receive authorized promotional or trial Licenses, if applicable (pursuant to this EULA). SmarterTools may create and provide certain Levels, Editions, and/or Versions of the Software that do not require entry or use of a License Key for promotional or other purposes. This EULA remains in full force and effect whether a License Key is required or provided by SmarterTools.

• "Multi-tenancy" and “Multi-tenant license(s)” shall refer to the ability of any single license to support multiple separate and unique client organizations, particularly when offering a single license in a Software as a Service (SaaS) capacity.

• "Periodic License" shall be a License with a defined start and end date whether such License is subject to renewal, automatically renews, effectively terminates, or is extended (e.g., Monthly/Lease Licenses, Trial Licenses, Development Licenses). Periodic Licenses may be governed by additional terms and conditions in a separate written agreement.

• "Software" shall mean any products developed by SmarterTools, and any third-party

products and/or services provided as part of those products and installed by end users and/or system administrators, regardless of where that installation occurs.

• "Third Party Providers" shall be any other software, application, plug-in, add-on, utility, tool, device, or methodology by any individual, group, organization, affiliation, company, or other entity that connects, modifies, links, and/or integrates to/with the Software for any purpose whatsoever.

• "Shared Hosting" shall refer to an individual, group, or organization ("Shared Host") that maintains a physical server device upon which software and/or tools are owned and installed by the Shared Host and made available to third parties for access or use; whether or not a fee or other compensation is exchanged; and in which the third parties do not have authorization or access to the activation areas of the Software and/or do not have authorization or access to system administration functions.

• "Worker(s)" shall be the location where software, websites or databases are installed in an Elastic Computing environment. A Worker can then have CPU cycles, disk space and RAM allocations and bandwidth modified (i.e., increased or decreased) on an as needed basis to accommodate shifts in traffic and usage. Also known as a worker process.

1. License

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D. Limitations on Use of the Software and License Keys

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2. Term and Termination

This EULA is effective as of the date You install or use the Software, or as of the date You accept this EULA, whichever is sooner. You may terminate this EULA by completely deleting and wholly destroying any copies of the Software and documentation in Your possession or control. SmarterTools may terminate and/or disable the License or EULA if, in its sole discretion, SmarterTools determines that You have breached any of the terms and conditions of this EULA, with or without notice to You of such termination.

Sections 1.B., 1.C., 1.D., 3, 5, 6, 7, 8, 9, 10, 11, 12, and 13 shall survive termination of this EULA.

3. Limited Warranty and Limitation of Liability

A. No Warranties

SmarterTools does not warrant that the Software will meet Your requirements, that the operation of the Software will be uninterrupted or error-free; that any data supplied by the Software will be accurate; or that the Software will work with any 3rd-party or supplemental software or hardware furnished with or accompanying the Software. Further, SmarterTools does not warrant the efficacy, functionality, or operation of such Accompanying Software or Hardware. ALL HARDWARE, SOFTWARE, OR OTHER PRODUCTS OR SERVICES PROVIDED BY SMARTERTOOLS UNDER THIS EULA ARE PROVIDE AS-IS, AND SMARTERTOOLS EXPRESSLY DISCLAIMS ALL WARRANTIES, INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

B. No Liability for Damages

SmarterTools shall not be liable for any damages under this EULA, including but not limited to consequential, statutory, punitive, incidental, or indirect damages, including but not limited to any loss of data, loss of profits, loss of savings, loss of time or convenience, or additional cost arising out of the use of or inability to use the Software, documentation, support, or any 3rd-party or accompanying software or hardware; even if SmarterTools has been advised of the possibility of such damages. Further, SmarterTools shall not be liable for nor bound by any claims, representations, promises, assertions, or other statements made by anyone other than SmarterTools employees or officers, including but not limited to resellers and sales representatives. SmarterTools shall not be liable for any damages or inconvenience resulting from errant data or misreporting of data, nor failures to relay information that may be deemed important by the user, any errant or substantial mistranslation of language or information, and/or for any damages arising from events listed in Section 5 of this EULA.

C. Third Party Providers and Web Services

The Software is designed to integrate and/or to be used in conjunction with Third Party Providers through web services. SmarterTools assumes no liability and makes no warranty or guarantee regarding the applicability or effectiveness of this Software when used in conjunction with these products or whether such integration or use might interfere with the operation therein. You agree to hold SmarterTools harmless in all matters resulting from the integration or use with Third Party Providers.

D. Limitation of Liability

Your sole remedy under this Agreement shall be limited to replacement of the Software.

4. Technical Support

Currently, SmarterTools provides technical support for the Software via SmarterTools personnel, documentation, and internet resources. For a period of time after initial purchase of a License, and for subsequent periods when Maintenance and Support is active for a License, technical support from SmarterTools personnel is provided at no charge. If Maintenance and Support is no longer active on a License or if the License is for a product that is no longer in development by SmarterTools, technical support is only available via documentation and internet resources. SmarterTools also provides fee-based tickets for

emergencies related to SmarterTools products, as well as training and installation of SmarterTools products. These fees may vary from time to time. Technical support is provided AS-IS, and the provisions of section 3.A., 3.B., 3.C, and 3.D. apply to technical support.

SmarterTools provides no guarantee, expressed or implied, regarding the efficacy or continuation of technical or other support for this Software or version of this Software for any length of time and SmarterTools may choose to discontinue such support at any time and for any reason.

5. Indemnification

You shall defend, indemnify, and hold harmless SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns (hereafter "SmarterTools Indemnified Parties") from any claims, damages, losses, or expenses (including without limitation attorney fees and costs) incurred in connection with any and all damages, losses, claims, suits, judgments, or causes of action asserted against SmarterTools Indemnified Parties by third parties or Your Customers related to:

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6. Transfers

The rights under the License may be sublicensed under the terms of Section 1.C. or transferred to any of Your successors, heirs, or assigns. Any other attempt to sublicense, assign, or transfer any of the rights, duties, or obligations hereunder is void unless You have a separate written agreement with SmarterTools allowing for such transfer(s).

7. Jurisdiction

This Agreement shall be governed in all respects by the laws of the United States and the State of Arizona, except for conflict of law's provisions. The parties agree that for any dispute, controversy, or claim arising out of or in connection with this Agreement, venue and personal jurisdiction shall be in the federal, state, or local court with competent jurisdiction located in Maricopa County, Arizona. The prevailing party will be entitled to an award of reasonable attorney's fees.

In the case that You are an agency or entity of the United States Government, the following additional terms apply:

- The Software qualifies as Restricted Computer Software, as defined in the Rights in Data-General clause at Federal Acquisition Regulations 52.227-14.
- Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013.

8. Payments

You shall pay the total fee(s) for the Software imposed by SmarterTools at the time of purchase. You shall pay all invoices rendered by SmarterTools within thirty (30) calendar days after the invoice date, or within another time frame set forth by SmarterTools in writing in a separate agreement. All payments shall be made in United States Dollars ($). If You fail to pay any amount due within the above timeframe, SmarterTools may impose late charges equal to the lesser of 1.5% per month or the highest interest rate allowable by applicable law, together with all related expenses and collection costs, including reasonable attorneys' fees, incurred by SmarterTools collecting any amounts owed under this EULA.

Further, You shall reimburse SmarterTools for any out-of-pocket expenses incurred in connection with duties performed by SmarterTools hereunder. Upon request by You, SmarterTools shall provide You with reasonable documentation evidencing the out-of-pocket expenses incurred by SmarterTools.

9. Limitations to Customization

Altering the appearance and/or user interface of the Software can only be achieved, and is only supported, by using the tools and options provided within the Software itself. (E.g., using the tools within the software to customize login pages and/or providing custom links to help documentation.) Any changes to any files installed with the Software that are made outside of the Software's interface is done at your own risk and will not be supported, retained or otherwise preserved during any upgrade, downgrade or other installation of the Software.

Any and all applicable copyright and trademark information shall not be removed in any way, shall remain visible to the naked eye and free from any clutter or similar color scheme. In addition, any proprietary notices in the Software shall be maintained and neither removed nor obscured in any way.

10. Transmission of Information and Communication

At purchase of the Software and at other times during the term of this EULA You will be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g., credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request and incorporated herein by reference. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

From time-to-time SmarterTools may contact You at any address, including any email address(es), You have provided to SmarterTools regarding the Software, available Updates or

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11. Third-party Correspondence, Interaction, Purchase, Service, or Promotion

During use of the Software, You may enter into correspondence with, purchase goods and/or services from, or participate in promotions of third party advertisers or sponsors displaying goods and/or services through the Software. Any such activity, and any terms, conditions, warranties, or representations associated with such activity, is solely between You and the applicable third party. SmarterTools shall have no liability, obligation, or responsibility for any such correspondence, interaction, purchase, service or promotion between You and any such third-party including, but not limited to, translations, mapping, sharing, or any other service or transfer, even if such third-party correspondence, interaction, purchase, service, or promotion is listed as a benefit or feature of the Software. SmarterTools explicitly disclaims any liability, obligation or responsibility for the continuation, viability, quality, reliability, or availability of any such third party provided correspondence, interaction, purchase, service, or promotion.

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In all events, conditions, and circumstances the provisions and limitations of Sections 3, 5, and 7 shall apply.

12. Severability

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein.

13. Disabling of Licenses

SmarterTools may disable License Keys at any time at its sole discretion. Examples of instances where License Keys may be disabled include, but are not limited to the following: for invoices that are not paid within a reasonable timeframe as determined by SmarterTools payment terms; License Key purchases that are made fraudulently and/or deceptively; License Key purchases that result in a charge-back or disputed charge; Instances where License Key owners threaten legal action against SmarterTools; Instances where License Key owners are deemed by SmarterTools to be abusive towards SmarterTools and/or SmarterTools employees, or otherwise refuse to work collectively with SmarterTools to resolve issues with our software whether through phone conversation, email, live chat, online message boards or community posts, or other means.

14. Dispute Resolution

Any and all disputes, Claims or controversies arising out of, relating to, concerning, or pertaining to the terms of this Agreement, or to either Party's performance or failure of performance under this Agreement (“Disputes”), which Disputes the Parties have been unable

to resolve by informal methods, will first be submitted to mediation in accordance with the procedures described in Section 14.1.

14.1 Mediation

Either Party may initiate mediation by providing Notice to the other Party of a written request for mediation, setting forth a description of the Dispute and the relief requested.

The Parties will cooperate with one another in selecting the mediator (“Mediator”) from the panel of neutrals from JAMS or any other mutually acceptable non-JAMS Mediator, and in scheduling the time and place of the mediation, per Section 7. Such selection and scheduling will be completed within 30 days after Notice of the request for mediation.

Unless otherwise agreed to by the Parties, the mediation will not be scheduled for a date that is greater than 60 days from the date of Notice of the request for mediation. The Parties covenant that they will participate in the mediation, and that they will share equally in its costs (other than each Party's individual attorneys' fees and costs related to the Party's participation in the mediation, which fees and costs will be borne by such Party).

All offers, promises, conduct and statements, whether oral or written, made in connection with or during the mediation by either of the Parties, their agents, representatives, employees, experts and attorneys, and by the Mediator or any of the Mediator's agents, representatives and employees, will not be subject to discovery and will be confidential, privileged and inadmissible for any purpose, including impeachment, in any arbitration or other proceeding between or involving the Parties, or either of them; provided, however, that evidence that is otherwise admissible or discoverable will not be rendered inadmissible or non-discoverable as a result of its use in the mediation.

15. Entire Agreement.

This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and understanding relative thereto, if any, being herein merged. This Agreement replaces and supersedes any prior agreement entered into between the parties hereto with respect to the subject matter herein.