A Step-By-Step Guide to Getting Started with Issuetrak

WHITE PAPER

Most organizations don't jump into implementing new software lightly. But getting started with a new software solution doesn't have to be a long, difficult process. Conducting research prior to investing in a software product ensures it will fit your company's needs and budget. With a plan in place for implementation and employee onboarding, your users will transition smoothly to using a new software solution, especially if the software is easy to learn.

The clock is already ticking by the time you identify a need for a new software solution - usually when a critical issue arises. Organizations must work quickly to research their options, compare products, decide on their purchase, and begin implementing the new software product they choose. This helps you immediately address the issues that drove you to search for solutions in the first place. But speed can compromise quality. A desire for a quick fix can leave your organization with a less-than-perfect product and confused, under-trained employees.

Self-service software options and other solutions may be quick to purchase, but without the right level of guidance during setup and implementation and beyond, they can leave you with more questions than answers in the long run.

With Issuetrak, every part of your process is designed to be as simple and efficient as possible, so you spend less time with awkward adjustments and more time fixing your team's or customers' problems. Read on for a step-by-step explanation of getting started with Issuetrak, from research to implementation and beyond.

Doing the Research

Research is an essential stage in any buying process. Your organization needs to know every possible detail about a product before making the important decision to invest money into it. How long that research process takes varies from company to company, based on time constraints, preferences, legal requirements, the approval process, and more.

Issuetrak provides plenty of accessible information to make that research process easier and less time-consuming, so you can quickly check our offerings against your organization's list of necessities.

Depending on what type of software you're looking for, we have a small collection of additional resources to help you get started in your search. These white papers uncover the main considerations you should make when comparing software solutions for your needs:

» [How to Select Issue Tracking Software](#)

» [How to Select Customer Service Software](#)

» [How to Select Help Desk Software](#)

For more Issuetrak-specific information, we also have a collection of online resources:

WEBSITE

[The Issuetrak website](#) is a hub of useful information about Issuetrak's basics: our software product, what it can do for your team, and the additional services we provide our customers. Navigate our website for highlights of Issuetrak's features, a showcase of the main industries using our product, and contact information to reach our team.

The website also hosts [Issuetrak Resources](), a library of supplementary information that will be useful to your decision-making process, including customer success stories, an informative blog from our own experts, and more.

HELP CENTER

Visit our [Help Center]() for a host of product *how-tos* and technical information about Issuetrak, such as our Privacy Policy, Release Notes, step-by-step instructions on using any of our features, and more.

TRAINING VIDEOS AND WEBINARS

Our collection of videos walks you through various Issuetrak features. We also feature a Webinar series tackling important, relevant topics, hosted by our very own Product Experts. All these videos are available on-demand on our [YouTube Channel]().

Scheduling An Issuetrak Demo

Once you determine that Issuetrak's feature-rich platform aligns with your organization's needs (we hope you do!), the next step is a conversation with us. One of our Business Development Representatives (BDR) will reach out to you, often within minutes or hours of your initial inquiry.

In a brief call, our BDR will gather key details about your business's needs and the goals you wish Issuetrak to help you accomplish. With this information we can put together a **tailored demo** for you as soon as possible, highlighting the most beneficial features to your team's specific needs. Our demos are a great time to ask questions about the product's capabilities, our services, pricing, and any other thoughts you may have.

Demos are a no-pressure conversation strictly meant to determine your needs. Afterward, we are happy to move at your organization's pace. Our BDR will continue to stay in touch after the demo and when your team is ready to purchase and implement our software solution, we will be ready to facilitate that process.

Getting An Issuetrak Eval Site

If you would prefer to take Issuetrak for a spin on your own, we can also provide you with your own Issuetrak *eval site*. This test site lets you dive deeply into Issuetrak's features, configure your own settings, and get a handle for how the software operates.

If you fall in love with your own eval site's configurations and you decide to purchase Issuetrak, we can easily carry over the changes you made to your newly purchased site at no extra cost.

The Purchasing Process

After a review and approval process with your team, you may decide to purchase your own Issuetrak site. At this point, there are a few steps that will occur:

» Your BDR contact will send you a quote for approval based on your required number of agents.

» The sale will be closed, and an invoice sent.

» Behind the scenes, our team will begin to work on putting your site (for cloud customers) or license key (for on-premises customers) information together for you.

» You may choose to schedule an Implementation session with our Professional Services team to get your Issuetrak site up and running (more on this below).

You won't have to wait long before getting your welcome email and site information – we work quickly to ensure you receive everything you need to get started within one business day of your purchase, often before close of business. If time is of the essence for your organization and you intend to move forward with our cloud option, we'll get your site **fully deployed and running within 24 hours.**

The contents of your welcome email depend on whether you purchased a cloud or on-premise version of Issuetrak. Cloud site customers receive login credentials and on-premise customers receive a license key and download instructions to get started as soon as possible.

On-premise customers will need to manually deploy their instance of Issuetrak. If you're a cloud customer, you can access your Issuetrak site and begin exploring what Issuetrak has to offer as soon as you receive your information. In some cases, you may be able to begin your configuration immediately. We created a friendly Getting Started module in our Help Center to make your deployment easier.

We strongly recommend purchasing a few hours of time with our Implementation team. The following section outlines some of the implementation and onboarding services they offer.

Site Implementation

We suggest every new Issuetrak customer start off with at least a few hours of training time with Pro Services. This is called an **Implementation session.** Our experts walk you through the basics of operating an Issuetrak site through one-on-one instruction and provide recommendations on best practices. We'll usually schedule a session for you within a few days of your purchase, if not within a few weeks.

Implementation sessions differ based on each customer's individual needs. Generally, these sessions are completed in two to three 2-hour sessions:

» **Session One:** Our product expert explains the basics of Issuetrak, including how to navigate the System Settings, as well as Issuetrak's major organizational categories.

» **Session Two:** You'll get a more detailed look at Issuetrak's key features, tailored to your team's usage. If you purchased any of our add-on modules, they will also be explained in this session.

The training can continue for as long as you need, so we can honor any additional questions you may have at the end of your Implementation. Our experts can be as involved as you want them to be, or you can fly solo with hands-on configuration. We work with complete transparency alongside you and your team to develop a training and implementation plan that works for you, whether you want us to configure the entire site for you, or if you are simply looking for a few pointers along the way.

ONSITE TRAINING

In some cases, you may want to have your Issuetrak training done in person. Our Pro Services team can meet you wherever your team is located to provide specialized training for you and your team. Having an expert alongside you in person gives you on-demand, focused attention – *and* provides *us* even more insight into your operations, your unique needs, and the best way to coalesce Issuetrak into your existing system.

ONBOARDING FOR EMPLOYEES

Your organization may already have a process for software implementation and onboarding users of your new Issuetrak site. Our team is happy and always available to offer additional onboarding assistance as well. Each member of our Pro Services team has years of experience with and an intimate knowledge of Issuetrak's every function. With hundreds of training sessions under their belts, they are equipped to familiarize your agents with Issuetrak as in-depth as you need.

Ongoing Support

Your Issuetrak site is up and running. You've gone through the necessary training. You've onboarded your users and given them the tools they need to operate the software. Now, you're ready to maximize your organization's potential and deploy Issuetrak at full capacity. Even at this point and beyond, our team will remain in contact with you to field any questions you may have and offer support and additional training as needed.

SUPPORT TEAM

Our [Support team](#) is always here to help. The team is trained and ready to assist you with any support-related problems you may have, 24 hours a day. If there's an error, an issue that needs troubleshooting, or any other concern with your Issuetrak site, we offer around-the-clock assistance to get you back up and running as soon as possible.

Our team has a customer satisfaction rating of over 98 percent and a call response time of 25 seconds. We know that any issue preventing your team from completing tasks is an emergency needing immediate attention. You can contact our team via phone, email, or chat and we will investigate, fix, or guide you through a solution so you can keep your operations running.

TUNE UPS

With new product updates released every month, you may want another training session on a new, emerging Issuetrak feature. Or perhaps you feel like your site is not operating as efficiently as it could be. Like our Implementation sessions, Tune Ups are training opportunities with our Professional Services team where you can pinpoint areas of your Issuetrak site that may need enhancing or gain knowledge in areas of the product that you want to learn more about. We can also help map goals for your organization's use of Issuetrak, provide an in-depth evaluation of your current site setup, and train new administrators you may have taken on since the original Issuetrak onboarding period.

REGULAR PRODUCT UPDATES

Our Development team works hard with our stakeholders to continue creating new, reliable features that enhance Issuetrak's functionality. Our monthly product releases maintain a rigorous pace, keeping you up to date on the industry's most useful features and ensuring your highest levels of productivity with our software solution. Each new release is accompanied by a wealth of content-rich resources, including Help Center articles, Webinar features, blog posts, social media, and YouTube. For specific questions and one-on-one walkthroughs, our team is always ready to provide you with additional support and training.

Get an overview of our product releases and future plans on our [Product Roadmap](). Customers may also submit ideas and comments on our [Feedback Page]() or social media channels.

Conclusion

Implementing a software solution to help with your organization's ticketing processes will turn your team's headaches into relief.

At Issuetrak, we work with you to provide the level of service and support your team needs to hit the ground running. Whether you need assistance with every step of the implementation process or feel confident in configuring your site and onboarding your employees yourself, our team is ready to provide whatever resources, guidance, and expertise necessary to support your Issuetrak integration and help you begin solving your organization's issues as soon as possible. The easier your software solution is to implement, the better your process issue ticket process will be, so you can get back to focusing on your own organization's missions sooner.