

A Step-By-Step on Getting Started with Issuetrak

WHITE PAPER

Getting started with a new software solution is a long and often difficult process. Most organizations don't jump into implementing new software lightly -- research must be conducted to ensure that the product will fit the company's needs and fit within its budget, and a plan for implementation and employee onboarding must be devised to ensure that users will have a smooth transition.

However, time is usually of the essence by the time a need for a new software solution has been identified. Organizations must work quickly to do the essential research and product comparisons, make the purchase, and begin the implementation process so that the issues driving the decision to find a new solution can be addressed. But speed can, at times, compromise quality, and a desire for a quick fix can leave an organization with a less-than-perfect product, or confused and under-trained employees.

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

Doing the Research

Research is an essential stage in any buying process. An organization needs to know every detail possible 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 white papers to help you get started in your search. These white papers discuss the main topics to take into consideration when comparing software solutions for the following 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: what the product is, what it can do for your team, and what additional services we provide our customers. Navigating through the website shows highlights of Issuetrak's features, highlights the main industries that use our product, and provides plenty of contact information if you need to reach our team.

The Website also hosts the [Issuetrak Resources Center](#), a library of supplementary information such as customer success stories, our blog, and more.

HELP CENTER

Our [Help Center](#) holds a host of product how-to's and technical information about Issuetrak such as our Privacy Policy, Release Notes, and more.

TRAINING VIDEOS AND WEBINARS

We also have a collection of videos that walk through various Issuetrak features, and a monthly Webinar series that tackles important topics, hosted by our Product Experts. All of these videos are available on-demand on our [Youtube Channel](#).

Scheduling An Issuetrak Demo

After ensuring that Issuetrak's feature set aligns with your organization's needs, the next step is to reach out to us to schedule a conversation. A Business Development Executive (BDE) will reach back out to you, often within a matter of minutes or hours of your initial inquiry.

In a quick call, the BDE can get a few key details about your business's needs and what goals you need Issuetrak to help you accomplish. With this information we can put together a **customized demo** for you as soon as possible, highlighting the features that will be most beneficial to your team's specific needs. This is also a good time to ask whatever questions you may have about the product's capabilities, our services, pricing, and more.

Our demos are no-pressure, but we are happy to move as quickly or as slowly as your organization needs to after your demo has concluded. Our BDE will continue to stay in touch after the demo and when your team is ready to purchase, 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 are also happy to provide you with your own Issuetrak eval site. This test site lets you dive more deeply into Issuetrak's features, configure your own settings, and get a handle for how the software works.

Additionally, if you decide to purchase Issuetrak after configuring your eval site, we can easily carry over the changes you made to your purchased site at no extra cost.

The Purchasing Process

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

- » Your BDE 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 a JumpStart session with our Professional Services team to get your Issuetrak site up and running (more on this below)

We move quickly to ensure that you get your welcome email and site information as soon as possible -- at least within one business day of your purchase, but often before close of business. If time is of the essence for your organization and you are intending to move forward with our Cloud option, we work fast to get your site **fully deployed and running within 24 hours.**

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

On-premises 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 do have a module in our Help Center called [Getting Started](#) created to help with your deployment.

However, we strongly recommend purchasing a few hours of time with our [Professional Services Team](#). The following section outlines some of the implementation and onboarding services that they offer.

Site Implementation

JUMPSTART

We suggest every new Issuetrak customer start off with at least a few hours of training time with Pro Services. This implementation assistance is called a **JumpStart** and provides you with one-on-one instruction and consultation with an expert who can walk you through the basics of operating an Issuetrak site, as well as provide advice and Best Practices recommendations. Usually we can schedule a JumpStart for you within a few days to a few weeks of your purchase.

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

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

If you have additional questions or needs at the end of your JumpStart, the training can continue as long as you need it to. Our experts can be as hands-on or hands-off as you need them to be. We work in conversation with 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 where your team is located to provide even more focused and specialized training for you and your team. Having an expert there in person provides us with even more insight as to how your organization operates, what your unique needs are, and how we can better integrate Issuetrak into your operations.

ONBOARDING FOR EMPLOYEES

While your organization may already have a process for software implementation and onboarding users of the new system, our team is happy to offer onboarding assistance as well. Every member of our Pro Services team has years of experience with Issuetrak and knows the product back and forth. They have performed hundreds of trainings and have the knowledge and tools to get your agents familiarized with Issuetrak as quickly as possible.

Ongoing Support

After your Issuetrak site is up and running, you've gone through the necessary training, and you've onboarded your users and given them the tools they need to operate the software, you should be ready to begin working with Issuetrak in earnest. However, even at this point our team will remain in contact with you in order 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 help 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 problem with your Issuetrak site, we offer round-the-clock assistance to help you get back up and running as soon as possible.

Our team has a customer satisfaction rating of over 97 percent and a call response time of less than a minute. We know that when you have an issue that's stopping your team from completing tasks, that's an emergency that needs immediate attention. You can contact our team via phone, email, or a chat client on our website and we will begin investigating the issue so we can provide a fix or walk you through a solution as soon as possible.

TUNE UPS

At some point you may want additional training on a new Issuetrak feature, or you may feel like your site is not operating as efficiently as it could be. Similar to our JumpStarts, Tune Ups are trainings with our Professional Services Team that are focused on pinpointing areas of your Issuetrak site that may need enhancing, or areas of the product that you might not be as knowledgeable about. We can also assist you in mapping 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 to continue creating new features and enhancing existing Issuetrak functionality based on support from our customers. In 2020 we were able to push out over 10 updates and intend to continue at that pace into the future. Anytime a major new feature is released we provide plenty of content to go with it, including explanatory Help Center articles, Webinar features, and oftentimes blog posts as well. For specific questions and one-on-one walkthroughs, our team is always available for additional support and training.

Our future plans for the product can be seen on our [Product Roadmap](#). We also have a [Feedback Page](#) where customers can submit their ideas and comments, and a [What's New Page](#) outlining our biggest and brightest new releases.

Conclusion

Implementing a software solution to help with your organization's problems should be a relief for your team, not a headache in itself. Self-service software options and other solutions may be quick to purchase, but without the right level of guidance during setup and implementation, they can leave you with more questions than answers in the long run.

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 you 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 efforts and help you begin solving your organization's issues as soon as possible.