



ISSUE TRACKING TOOLS FOR AUTOMATION BEST PRACTICES

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Task Manager

Assign tasks to anyone responsible for completing an action on a ticket. Simply check yes, no, or N/A to complete a task and let automation take its course. Branching tasks can mirror any of your internal processes, making ticket handling a snap.

Automation Workflows

Workflows help move tickets forward and ensure no issue gets left behind. The 3 parts of a workflow are: *interval* of time from submitting a ticket, *conditions* of the ticket to monitor, and the resulting *actions* you perform. Define workflows to match your process and excel in service!

Substatus Rules

If a submitter opens, closes, assigns, or adds a note to a ticket, Substatus Rules will trigger the substatus to change accordingly. Seeing the substatus of a ticket at a glance helps agents prioritize the tickets they have to monitor or immediately solve.

Scheduled Reporting

Make use of Scheduled Reporting tools and show progress reports periodically, at whatever interval you define. This best practice maintains open visibility on your organization's performance and the ticketing volume you handle.

Custom Messages

Custom Messages can come pre-built, and you can curate them at any time. Using templates in automated responses helps keep eyes on ticket status and prompts users to action. Be sure to leverage your software's Professional Services team to set your tool up with you.