

# intertrac for Government

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## Catalog of Solutions





# DESIGNED FOR YOU

## A customized solution

For over twenty years, we've built the intertrac system to meet the exact needs of a government office. And since intertrac arrived in the United States Senate, we have continued to add features based on user requests, like simple polls, tour request integration, and A/B testing for newsletters. This is software designed for you.

### Easy to Use

User friendly interface. Personal dashboards. One-click navigation. Rolodex views. Data sorts. Microsoft Office integration. Full-text search. Wizards. Templates. Yeah, we got this.

### Powerful Tools

intertrac gives you the powerful tools you need to quickly and efficiently get the job done, like the ability to access every call or letter or case for a single constituent with one click of the mouse.

### A Secure System

intertrac provides a security-rich and reliable architecture for your data. Within the system, data can be secured by user group, individual users, and even by document. Senate hosted with multi-factor authentication. CMMI Level 2 compliant.


### Agile Administration

intertrac is a scalable system with unlimited growth potential. Views, forms, reports, and even fields can be configured to meet the unique needs of your office. Application delivery is browser based and both PC and Mac compatible.

### Premium Support

intertrac delivers unrivalled product support. We supply rapid deployment schedules, onsite technicians for hands-on user technical support, ongoing assistance, and staff and intern training. Need more help? We offer additional coaching for any staff or intern who needs more guidance. And if you work, we work (even if it's not regular business hours).





## Tidal waves of incoming communications



# 260%

Average increase of constituent mail volumes for intertrac offices during the 115th Congress.

Today, congressional offices have to face higher volumes of constituent letters, web mail, and phone calls than ever before. The intertrac system is designed to help handle waves of communications, so you can focus on giving unique messages the attention they deserve.

**Smart Merge** automatically merges the right response letter to all copies of advocacy mail as it comes in the door. Our Smart Merge works with our MailTAG utility and Mail Groups to make it easier to reply to grassroots and other write-in campaigns.

The **MailTAG** utility identifies grassroots campaigns and other bulk mail before you even look at it. MailTAG automatically detects messages that are very similar and groups them, so all you have to do is review the message and response before sending them out the door.

Use the **Mail Groups** to tag similar correspondence, collecting messages that have the same topics and constituent position for mass responses. A Mail Group can be configured to Smart Merge a response, and may be automatically assigned to a group of letters by the MailTAG utility.



# CONTACTS

The intertrac Contacts solution is the heart of the system. All transactions and processes in the system — calls, appointments, correspondence, casework, etc. — are associated to the central contact record. This allows you to retrieve a contact's entire history with a single click.

- Flag VIPs and friends
- Log threats and POIs in the Incident Report; anything created for that contact will also be flagged
- Enter unlimited addresses
- Record Facebook and Twitter handles
- Group contacts by affiliations, categories, and types
- Automatically update newsletter subscriptions and Do Not Mail flags
- Bring in voter registration data and updates with the Import Wizard
- Set repeat fields for quick data entry
- **No Wrong Doors** — enter contact data one time only, whether in another form, through a data import, or via website submission

## CONSTITUENTS

## COLLEAGUES

## INTERNS

## STAFF

## AGENCY LIAISONS

HOME - CORRESPONDENCE - CASEWORK - CONTACTS - SCHEDULING - NEW MEDIA - CONSTITUENT SERVICES - ADMINISTRATION - TIME MANAGEMENT - HISTORY - CWORKS ACCOUNT - LOGOUT

Contacts

Incident Reports

Human Resources

Maintenance

InterTrac Search...

Create New...

Associate - Options - Search this view...

Selected 1

Constituent

Colleague

Intern

Agency

Staff

View By...

All Contacts

Constituents

Colleagues

VIPs

POIs

Agencies

By Category

By Vote History

Staff

Interns

Folders

<input checked="" type="checkbox"/>	Name	Address	City	State	Zip	County	Email
<input checked="" type="checkbox"/>	A. Emilia	56 Wilderness Drive	Stony Point	AR	10980	Rockland	emiliaj@it.com
<input checked="" type="checkbox"/>	A. Sarah	11 Turner Drive	Washington	DC	20002	District Of Columbia	sarah10@gmail.com
<input type="checkbox"/>	Albert, Lenworth	10 Emerald Court	Schenectady	NY	12345	Schenectady	jumper892@gmail.com
<input type="checkbox"/>	Aduarle, Jesse	444 Willett Avenue	Port Chester	NM	10573	Westchester	jes05456@gmail.com
<input type="checkbox"/>	Ahan, Jung	94 Virginia Avenue	Dobbs Ferry	NY	10522	Westchester	soonyun234@gmail.com
<input type="checkbox"/>	Akinori, Frank	101 Gedney Street	Nyack	AL	10960	Rockland	franke23g4@gmail.com
<input type="checkbox"/>	Artinez, Luis	219 Harrison Avenue	Harrison	DE	10528	Westchester	artinez4310@yahoooof.com
<input type="checkbox"/>	Ashaw, Kirsten	177 Filors Lane	Stony Point	GA	10980	Rockland	kirstenaw24@yahooaol.net
<input checked="" type="checkbox"/>	Aspas, Brett	55 Chelsea Street	Hawthorne	FL	32640	Alachua	Brett@gmail.com
<input type="checkbox"/>	Ataylor, Luke	24 Westview Avenue	White Plains	NY	10602	Westchester	luke474524@hotmail.net
<input type="checkbox"/>	Aulumi, Barbara	52 Campwoods Grounds	Ossining	LA	10562-3703	Westchester	babs98705@optonline.netz
<input type="checkbox"/>	Axe, Nunzio	30 Windsor Terrace	White Plains	NH	10601	Westchester	nunz35@gmail.com
<input type="checkbox"/>	Ayn, Natalia	4 Jay Road	Cortlandt Manor	DC	10567	Westchester	Mariposa24675@gmail.com
<input checked="" type="checkbox"/>	Azact, Timothy	10 Main Street	Washington	DC	20002	District Of Columbia	jose.aact@gmail.co

Contact

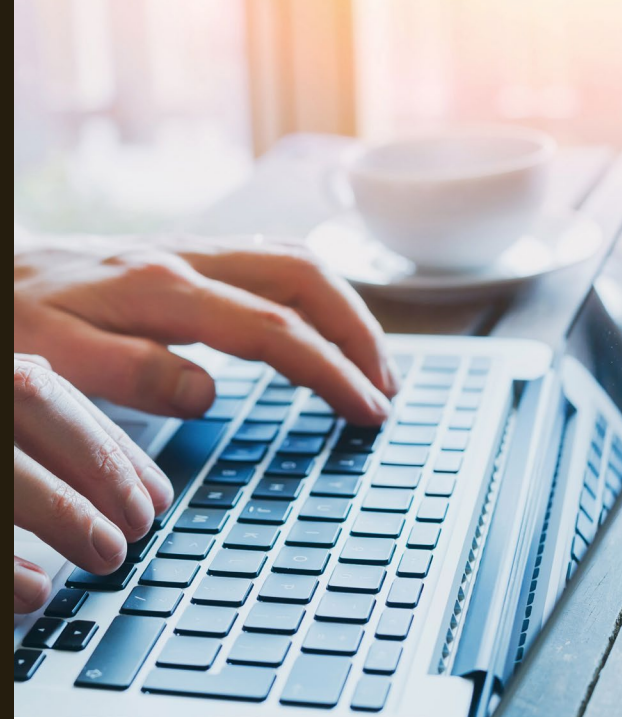
Mr. Timothy Azact

Acme Inc.  
President  
10 Main Street  
Washington, DC 20002

Salutation: Mr.Azact  
Phone: 518-366-5757

Email: jose.aact@gmail.co  
Category: Environment - Pro  
NAFTA - Pro  
Wildlife Advocate

Newsletter: Newsletter Subscriber  
County: District Of Columbia  
District: 01  
Created: 07/12/2017 03:40:46 PM EDT



## Taking the people's temperature

When issues change as quickly as the news cycle, how do you take the temperature of your constituency? You'll need tools that are designed to capture numbers and manage the flow.

intertrac has you covered with tools that:

- Track incoming opinions and constituent position on hot topics in real time
- Send out a customized poll or survey and analyze results
- Report on trending topics and robust metrics
- Capture what your constituents are saying on Facebook and Twitter



# Correspondence

## SO MANY MESSAGES. SO LITTLE TIME. #worksmarter

Track incoming letters, email, faxes, and bulk mail to create outgoing responses and communications, all within one central database. intertrac has been fully customized for the unique workflow of a Senate Office. From incoming correspondence, web mail, and CWC messages to outgoing responses, intertrac will help you respond to constituent communications and replies more efficiently.

HOME - CORRESPONDENCE - CASEWORK - CONTACTS - SCHEDULING - NEWS MEDIA - CONSTITUENT SERVICES - ADMINISTRATION - TIME MANAGEMENT - HISTORY -									
Correspondence Letter Library Executive Correspondence Email Gateway Maintenance									
Create New...	Associate Options Process Search this view								
Correspondence	Mail Group	Rec'd	Contact	Tracking #	%	Status	Subject	Assigned To	
Filter By...	Support the Land and Water Conservation Fund	01/13/2018	Ferrante, Tony	12234-1c...	0%	Open	Conservation - PRO	Alan Gore	
(271) Support the Land and Wat	Support the Land and Water Conservation Fund	01/13/2018	Polera, Sharon	12253-1c...	0%	Open	Conservation - PRO	Alan Gore	
(257) Don't Let Pete Stone	Support the Land and Water Conservation Fund	01/13/2018	Flanagan, Tina	12297-1c...	0%	Open	Conservation - PRO	Alan Gore	
(204) Protect Mueller before i	Support the Land and Water Conservation Fund	01/13/2018	Stah, Jim	12299-1c...	0%	Open	Conservation - PRO	Alan Gore	
(191) Protect our coastal wate	Support the Land and Water Conservation Fund	01/13/2018	Ferguson, James	12319-1c...	0%	Open	Conservation - PRO	Alan Gore	
(165) HR 200	Support the Land and Water Conservation Fund	01/13/2018	Sorrentino, Jessica	12332-1c...	0%	Open	Conservation - PRO	Alan Gore	
(153) H.R. 3599, H.R. 2887, an	Support the Land and Water Conservation Fund	01/13/2018	Feigenbaum, Lester	12360-1c...	0%	Open	Conservation - PRO	Alan Gore	
(153) IARC research on glyphos	Support the Land and Water Conservation Fund	01/14/2018	Rodriguez, Rosa	12377-1c...	0%	Open	Conservation - PRO	Alan Gore	
(148) Nuclear Posture Review	Support the Land and Water Conservation Fund	01/14/2018	Cramsis, Jimmy	12479-1c...	0%	Open	Conservation - PRO	Alan Gore	
(148) Oppose the SECA Act, H.R.	Support the Land and Water Conservation Fund	01/14/2018	Wallace, Lue	12497-1c...	0%	Open	Conservation - PRO	Alan Gore	
(144) Speed Up the Pace to End	Support the Land and Water Conservation Fund	01/15/2018	Osborne, Denis	12519-1c...	0%	Open	Conservation - PRO	Alan Gore	
(143) HR 4532 and HR 3990	Support the Land and Water Conservation Fund	01/15/2018	Osuna, July	12641-1c...	0%	Open	Conservation - PRO	Alan Gore	
(140) Reject Trump's Infrastru	Support the Land and Water Conservation Fund	01/15/2018	Khatt, Precious	12657-1c...	0%	Open	Conservation - PRO	Alan Gore	
(126) Rep. Lowey Stop Presiden	Support the Land and Water Conservation Fund	01/15/2018	Smith, Sammy	12681-1c...	0%	Open	Conservation - PRO	Alan Gore	
(125) The military mutilates a	Support the Land and Water Conservation Fund	01/15/2018	Roch, Gina	12700-1c...	0%	Open	Conservation - PRO	Alan Gore	
(122) Please Defend National M	Support the Land and Water Conservation Fund	01/16/2018	Gerald, Tia	12843-1c...	0%	Open	Conservation - PRO	Alan Gore	
(116) DACA is Ending - Pass th	Support the Land and Water Conservation Fund	01/17/2018	Mathes, Stacie	13266-1c...	0%	Open	Conservation - PRO	Alan Gore	
(116) NO Special Diabetes Prog	Support the Land and Water Conservation Fund	01/17/2018	Magel, Marcus	13374-1c...	0%	Open	Conservation - PRO	Alan Gore	
(116) Protect our communities:									
(112) Oppose HR 3599 to protec									
View By...									
All									
Pending									
Assigned To									
Sorted									
Unsorted									
CWC Mail									

### With intertrac Correspondence, users can:

- Identify grassroots advocacy campaigns, astroturfing campaigns, and other bulk mail before it hits your inbox
- Automatically separate bulk mail from unique messages
- Automatically respond to bulk mail by topic
- Automatically group mail with similar language
- Draft unique letters in Microsoft Word
- Route responses through custom approval cycles
- Log and track executive correspondence such as Dear Colleague letters and handwrites
- Maintain a library of Microsoft Word letter templates with user friendly prompts and merge fields
- Automatically switch between print and email formats
- Give email professional polish with graphic HTML headers and footers





# CASEWORK

Modernize  
your office...

The screenshot displays the intertrac Casework form interface. It features a table with columns for Case No., Organization, Agency, Case Title, Status, and Date Added. Below the table, there is a detailed view of a specific case, including fields for Case No., Case Title, Status, and Date Added. The interface is designed to be user-friendly and efficient for managing casework.



# 300%

more newsletters  
are being sent to  
constituents now  
than at the start  
of the pandemic

With the pandemic, most offices saw an uptick in the number of constituent requests for assistance, and caseworkers faced with heavier workloads required more efficient case management tools. Why would you want fields on a form that you won't use?

The dynamic intertrac Casework form automatically changes its data fields to collect crucial information for that case. For example, an immigration case includes fields for Alien Number, INS Receipt Number, and Type of Visa/Petition; but a Housing case includes Loan Number, Lender/ Servicer, and Foreclosure Sale Date fields.

No extra fields to jump around, just the specific fields you need.

When a constituent requests assistance in a call or letter, you can click a button to promote the communication to a case and assign the case to the appropriate caseworker.

intertrac's built-in workflow provides assigned staff with status updates and task reminders. Filtered views allow you to see just your own cases. A dedicated library of casework letter templates makes it easy to keep key contacts connected and informed.

And intertrac enables you to associate every person and agency contact, every related meeting, communication, file, or form to the casework form, so you can retrieve a **360-degree view** of the case history with a single click.



# NEWSLETTERS AND SURVEYS

Step up your constituent outreach efforts with the intertrac Newsletter solution. Newsletters integrate with the entire intertrac system so you can use your existing contact records to build mailing lists, track related activity, and update contact records with opt-in and subscription responses.

A number of enhancements are designed to make it easy for any user to quickly build a professional looking newsletter and send it to the masses.



## Newsletter Builder

Let the Newsletter Builder step you through creating, testing, and sending outreach mail. Includes custom templates and an image library.



## Survey Builder

Build a custom survey or poll, embed it in a newsletter, and watch the results pour in. To take it a step further, reach out to respondents again about their answers.



## Analytics

Measure opens, click-throughs, non-deliverables, and other performance insights with built-in analytics.



## Emojis

Add emojis to the subject line to catch your reader's attention and improve open rates.



## A/B Testing

Conduct testing with a sample audience to determine which email performs better and improve conversion rates.



## Custom Design

Drag and drop design elements onto the page to customize your design. Advanced users can fine tune the HTML source code.

SEND EMAIL  
THAT YOUR  
CONSTITUENTS  
WILL ACTUALLY  
**OPEN**

The screenshot displays the intertrac Newsletter Builder interface. On the left, the 'Newsletter Overview' section includes fields for 'Newsletter Type' (Standard selected, Opt-in available), 'Internal Subject' (testing my survey), 'Description', 'Created' (12/14/2017), 'Status' (Open), 'Target Audience', 'Newsletter Subject' (Emailed Newsletter Subject), and 'Generic Link'. Below this is the 'Send Preview Test' section with a 'Send To' field, checkboxes for 'Disable BASE64 encoding for test' and 'Disable link redirects for test', and a 'Send' button. At the bottom, there are tabs for 'HTML', 'Images', and 'Survey', with a note: 'Survey associated with this newsletter: Existentialist crisis'. On the right, the 'Preview' section shows a sample newsletter layout for 'JACK SPARROW United States Captain for the Black Pearl'. The layout includes a greeting 'Dear Friend,', a paragraph about opinion matters, a signature 'Sincerely, Captain Jack', and a link to take a survey. At the bottom of the preview, there are links for 'CONTACT', 'WEBSITE', and a social media bar with Facebook, Twitter, and YouTube icons. A footer note says 'PLEASE REPLY USING THE CONTACT LINKS ABOVE' and an 'UNSUBSCRIBE' link.

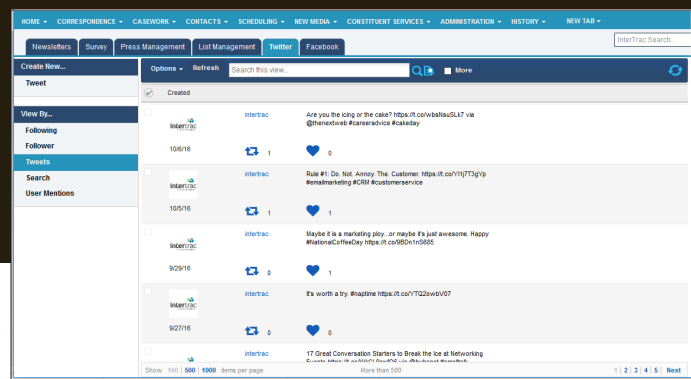




# 76%

of staffers surveyed felt that social media enabled their offices to have more meaningful constituent interactions. \*

\*from “#SocialCongress,” Congressional Management Foundation (2015)



# New Media

The intertrac New Media solution is your public relations hub, giving you powerful tools to share your message.

With intertrac’s integrated solutions, you can keep track of what you said and where you said it.

## Social Media

- Integrate public Facebook and Twitter accounts
- Save posts and comments as correspondence
- Automatically associate communications to constituents
- Manage public accounts from one location
- Monitor engagement using insights and analytics

## Press Management

- Manage your media contacts in dedicated forms and views
- Compose press releases in Microsoft Word
- Schedule press releases for delayed sends
- Sort contacts by role, beat, region, etc.
- Send via stored distribution lists
- Auto update the press contacts with each release

## Telephone Town Halls

- Arrange live multimedia events with Broadnet Access Live
- Generate invitation lists from your constituent data
- Conveniently upload contact lists, images, and sound files from one location
- Store event reports
- Update constituent profiles with actionable data





# SCHEDULING

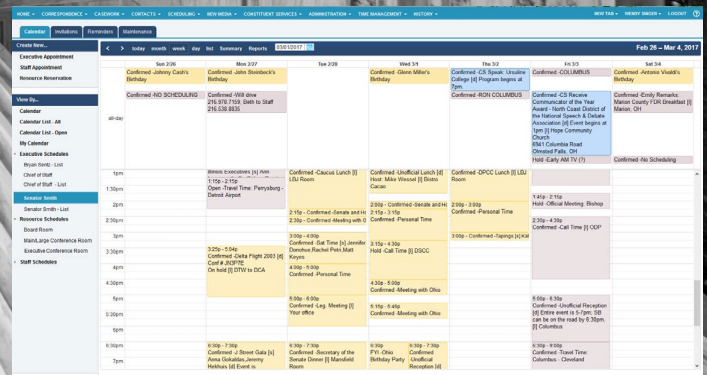
This optional module is available with intertrac at an additional cost. Please contact us for pricing.

The intertrac Scheduling solution is a robust calendar for managing meetings, appointments, activities, and events. It also includes calendars for managing invitations and room reservations.

Tightly integrated with other CSS features, the calendar views give you a variety of ways to examine appointment information — by assigned staff, by date, by company, or by day, week, or month. Standard features like two-day views, work week views, and full-text searching are available in every view for pinpointing data.

With intertrac Scheduling, your office can maintain as many different calendars as you need. So you can have executive calendars for the Senator, Chief of Staff, and State Director; group calendars for the DC and state offices; individual staff calendars; and resource reservation calendars to track who is using the conference room or media equipment. Additionally, executive calendars are locked down so that only schedulers can add or edit appointments.


- Drag and Drop editing
- Microsoft Outlook synchronization
- Advanced analytics and reports
- Custom Color Coding
- Calendar and summary view toggle
- My Calendar view for just your appointments
- Repeat appointments
- Staff reminders
- Time zone management
- Powerful searching

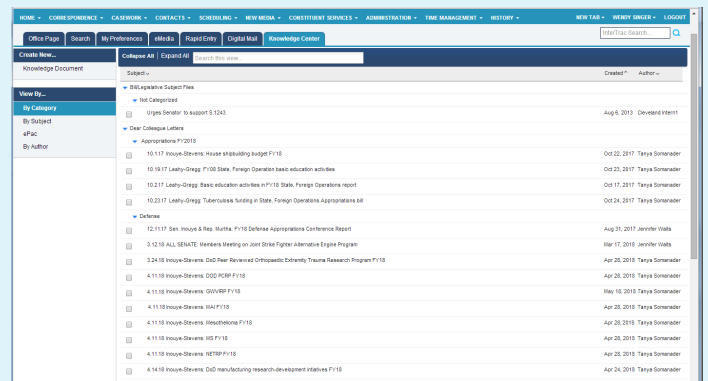




## Let them know you're listening

intertrac has you covered. Fulfill **flag requests**, check off **nomination** packets and interviews, accept **intern applications**, and track **grants**. Your subscription also includes **built-in tour requests** to help you track and schedule tickets and reservations. Every constituent contact and communication is available at your fingertips.

HOME	NEWS	CORRESPONDENCE	CAMPAIGNS	CONTACTS	ROYALTY.BUS	NEW MEDIA	CONSTITUENT SERVICES	ADMINISTRATION	TIME MANAGEMENT	WELCOME	CHORUS ACCOUNT	LOGOUT		
<a href="#">Options</a>	<a href="#">Flags</a>	<a href="#">Tools</a>	<a href="#">Links</a>	<a href="#">Applications</a>	<a href="#">Projects</a>	<a href="#">Newsletters</a>	<a href="#">Grants</a>	<a href="#">Help Desk</a>	<a href="#">Maintenance</a>	<a href="#">Web Tracking</a>	<input type="text" value="Search Results"/>			
<b>County Menu</b>														
<b>Options</b> <input type="text" value="Search this view"/> <input type="button" value="Go"/> <input type="button" value="More"/>														
<b>Hot Topics</b>														
<b>Filter By...</b>	<b>Clean Energy Act</b>	06/22/2018	Rockland	<b>Category</b>	<b>Support</b>	<b>Oppose</b>	<b>Comment</b>	<b>No Opinion</b>	<b>Total</b>					
 (15) Clean Energy Act	Clean Energy Act	06/22/2018	Rockland	Defense & Military	0	0	0	0	1					
(15) Clean Energy Act	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
(10) DART	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
(10) M&T	Clean Energy Act	06/22/2018	Rockland	Defense & Military	0	0	0	0	1					
(9) D&D Nuclear	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
(7) Financial Reform	Clean Energy Act	06/22/2018	Westchester	Current Events	0	0	0	0	1					
(7) Supreme Court Issue	Clean Energy Act	06/22/2018	Westchester	Current Events	0	0	1	0	1					
(2) Ints Inc	<input checked="" type="checkbox"/> Clean Energy Act	06/22/2018	Rockland	Judiciary	0	0	0	0	1					
(1) Inc and Trade	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
<b>View By</b>	Clean Energy Act	06/22/2018	Westchester	Judiciary	0	0	0	0	1					
<b>County</b>	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
<b>Date Received</b>	Clean Energy Act	06/22/2018	Rockland	Defense & Military	0	0	0	0	1					
<b>Hot Topics</b>	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					
	Clean Energy Act	06/22/2018	Westchester	Defense & Military	0	0	0	0	1					



The Knowledge Center gives your office a place to share documents that support your office operations. Store any information that you need here – **news clippings, photographs, videos, briefings, training materials, policy statements, speeches, URLs, etc.** Over time, intertrac becomes a central library for your organizational knowledge.

The Knowledge Center also houses the **ePacs** feature for emailing rapid response packets to your constituents, like privacy release forms and DC visitor guides. Using the convenient dashboard widget, staff can enter the constituent email address and fire off the ePac with the click of a button.

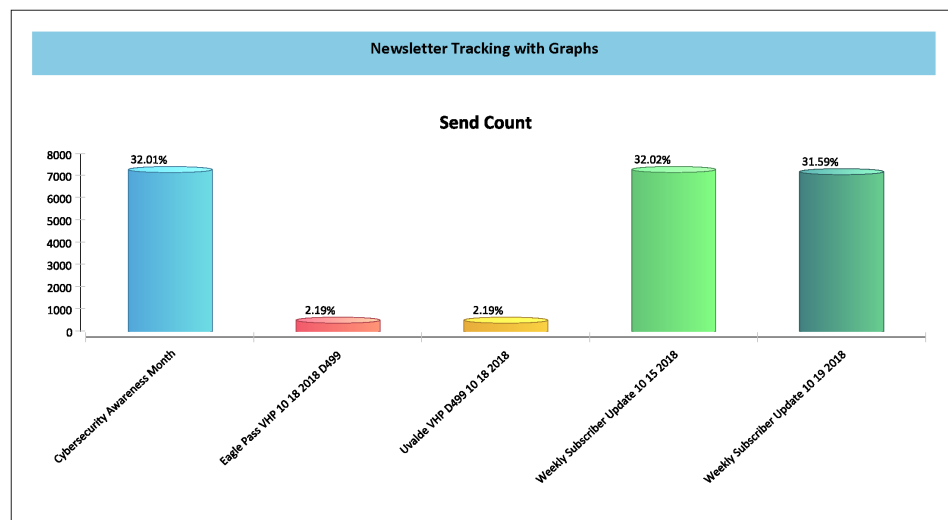


# Reporting

intertrac features an integrated reporting and analytics solution so that you can measure essential data right at the point you need it. intertrac is supplied with a library of reports, including turnaround, summary, ranked, and trend reports, and also provides ad hoc and custom reporting options. Geospatial mapping analytics generate heat maps and choropleth maps to visually represent metrics and variability within a region. Summary reports update office statistics right in your dashboard.

And intertrac can be set to automatically generate any report on a scheduled basis and deliver it to your inbox and anyone else that you tell it to.

- Report library
- Automated reports
- Heat and Choropleth maps
- Custom reports
- Microsoft Word, Excel, PDF or HTML file formats





the right solution

# The intertrac Difference

When you're comparing apples to apples, what makes intertrac stand out?

COMPUTERWORKS

12

Corporate Woods Boulevard  
Albany, NY 12211

1.800.692.7787  
info@computerworks.com  
www.computerworks.com



CMMI® Level 2 Rated

## Our support team

With intertrac, you always get premium technical support. At ComputerWorks, we value each and every opportunity to serve you. When you call our office, you'll speak directly with technicians dedicated to your office. And if you have to call back, you'll have a direct line to the same person so you can pick up right where you left off. Still need more help? We have experts onsite every day, offering hands-on technical support and additional coaching for any intertrac users who need guidance.

## Designed for YOU

When you choose intertrac, we will configure the system and develop custom reports for your office's unique needs. We will review every question, request, and suggestion that you send to us. Because we continuously enhance the system based on user feedback, intertrac is actually a system that our user community helps design. And we make sure intertrac works exactly for YOU.

In a basket of apples, that's what makes intertrac an orange.

Due to proprietary and security concerns, ComputerWorks does not release, share, or otherwise disclose our source code or other intellectual property. We expressly restrict and prohibit other applications from directly accessing any data in the intertrac product. Secure API interconnections will be accommodated at the discretion of ComputerWorks and the customer.