

# intertrac for Government

---

## Catalog of Solutions





# DESIGNED FOR YOU

## A customized solution

The intertrac system can be designed to meet the exact needs of a public sector office, with such features as casework, complaints, e-newsletters, FOIL requests, and more. At work in state and municipal organizations, intertrac can be tailored to your needs and your unique forms and workflow processes, giving you the benefits of a custom fit solution with our-of-the-box convenience. 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 constituent with one click.

### 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. NIST and 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



# 319.6

billion emails were sent  
and received globally on  
a daily basis in 2021.

Source: Statista Research  
Service

Today, government 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
- Import voter registration data and updates
- 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...

🔍

📄

🔗

More

Selected 1

🔄

Constituent

Colleague

Intern

Agency

Staff

View By...

All Contacts

Constituents

Colleagues

VIPs

POIs

Agencies

By Category

By Vote History

Staff

Interns

Folders

👤

Name

📍

Address

🏡

City

🗺️

State

📮

Zip

🏠

County

✉️

Email

👤

A. Emilia

56 Wilderness Drive

Stony Point

AR

10980

Rockland

emilija@it.com

👤

A. Sarah

11 Turner Drive

Washington

DC

20002

District Of Columbia

sarah10@gmail.com

👤

Abert, Lenworth

10 Emerald Court

Schenectady

NY

12345

Schenectady

jumper892@gmail.com

👤

Aduarte, Jesse

444 Willett Avenue

Port Chester

NM

10573

Westchester

jes05456@gmail.com

👤

Ahan, Jung

94 Virginia Avenue

Dobbs Ferry

NY

10522

Westchester

soonyun234@gmail.com

👤

Akkrin, Frank

101 Gedney Street

Nyack

AL

10960

Rockland

frankie3314@gmail.com

👤

Artinez, Luis

219 Harrison Avenue

Harrison

DE

10528

Westchester

artinez4310@yahoooo.com

👤

Ashaw, Kirsten

177 Floris Lane

Stony Point

GA

10980

Rockland

kirstenaw24@yahooaiz.net

👤

Aspas, Brett

55 Chelsea Street

Hawthorne

FL

32640

Alachua

Brett@gmail.com

👤

Ataylor, Luke

24 Westview Avenue

White Plains

NY

10602

Westchester

luke474524@hotmailz.net

👤

Auturni, Barbara

52 Campwoods Grounds

Ossining

LA

10562-3703

Westchester

babs98765@onlinez.netz

👤

Axe, Nuno

30 Windsor Terrace

White Plains

NH

10601

Westchester

nunc35@gmail.com

👤

Ayn, Natalia

4 Jay Road

Cortlandt Manor

DC

10567

Westchester

Maniposa24675@gmail.com

👤

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

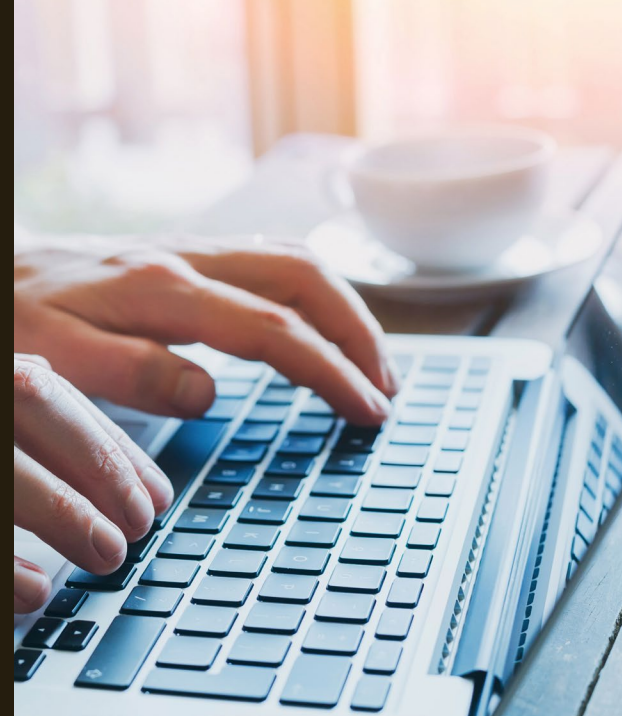
Category  
Environment - Pro  
NAFTA - Pro  
Wildlife Advocate

Newsletter  
Newsletter Subscriber

Country  
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 public sector office. From incoming correspondence to outgoing responses, intertrac will help you manage incoming 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	
(2718) 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	Stath, 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	
(171) Keep conservation fundn	Support the Land and Water Conservation Fund	01/13/2018	Sorrentino, Jessica	12332-1c...	0%	Open	Conservation - PRO	Alan Gore	
(165) HR 200	Support the Land and Water Conservation Fund	01/13/2018	Feigenbaum, Lester	12360-1c...	0%	Open	Conservation - PRO	Alan Gore	
(153) H.R. 3599, H.R. 2887, an	Support the Land and Water Conservation Fund	01/14/2018	Rodriguez, Rosa	12377-1c...	0%	Open	Conservation - PRO	Alan Gore	
(153) IARC research on glypho	Support the Land and Water Conservation Fund	01/14/2018	Cramsin, Jimmy	12479-1c...	0%	Open	Conservation - PRO	Alan Gore	
(148) Nuclear Posture Review	Support the Land and Water Conservation Fund	01/14/2018	Wallace, Lue	12497-1c...	0%	Open	Conservation - PRO	Alan Gore	
(148) Oppose the SECA Act, H.R.	Support the Land and Water Conservation Fund	01/15/2018	Osborne, Denis	12519-1c...	0%	Open	Conservation - PRO	Alan Gore	
(144) Speed Up the Pace to End	Support the Land and Water Conservation Fund	01/15/2018	Osuna, July	12641-1c...	0%	Open	Conservation - PRO	Alan Gore	
(143) HR 4532 and HR 3990	Support the Land and Water Conservation Fund	01/15/2018	Khatt, Precious	12657-1c...	0%	Open	Conservation - PRO	Alan Gore	
(140) Reject Trump's Infrastru	Support the Land and Water Conservation Fund	01/15/2018	Smith, Sammy	12681-1c...	0%	Open	Conservation - PRO	Alan Gore	
(126) Rap, Lowey Stop Presiden	Support the Land and Water Conservation Fund	01/15/2018	Rock, Gina	12700-1c...	0%	Open	Conservation - PRO	Alan Gore	
(125) The military mutilates a	Support the Land and Water Conservation Fund	01/16/2018	Gerald, Tia	12843-1c...	0%	Open	Conservation - PRO	Alan Gore	
(122) Please Defend National M	Support the Land and Water Conservation Fund	01/17/2018	Mathes, Shale	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:

- Draft unique letters in Microsoft Word
- Automatically reply to bulk mail
- Automatically group mail with similar language
- Identify grassroots advocacy campaigns, astroturfing campaigns, and other bulk mail before it hits your inbox
- Route responses through custom approval cycles
- Log and track executive correspondence such as hand writes and Dear Colleague letters
- 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
- Respond to voice mail left after hours





# CASEWORK

## Modernize your office...

A screenshot of the intertrac Casework form interface. The interface is a web-based application with a blue header bar. Below the header, there's a sidebar on the left with navigation options like 'Cases', 'Reports', and 'Tools'. The main area displays a table of cases with columns for Case No., Organization, Case Title, Status, and Assigned To. A specific case is highlighted, showing details like 'Case No. 12345', 'Organization: ABC Company', and 'Case Title: Request for assistance'. Below the case details, there's a section for 'Attachments' and a 'Comments' section with a text area and a 'Save' button.

# 300%

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

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

The dynamic and customizable Casework form will automatically present the most crucial data fields for the type of case. For example, a Complaint may include contact fields for complainant and the business or utility in question; but a Legal case includes Docket Number, Attorney, and time management fields.

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

When calls or letters come in requesting assistance, you can easily promote them to a case and assign the case to the appropriate caseworker. You'll save time and effort, plus you'll never have a case fall through the cracks.

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. Take it a step further and 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 preview includes a salutation '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', 'f', 't', 'v', and 'WEBSITE', along with a footer note 'PLEASE REPLY USING THE CONTACT LINKS ABOVE' and an 'UNSUBSCRIBE' link.

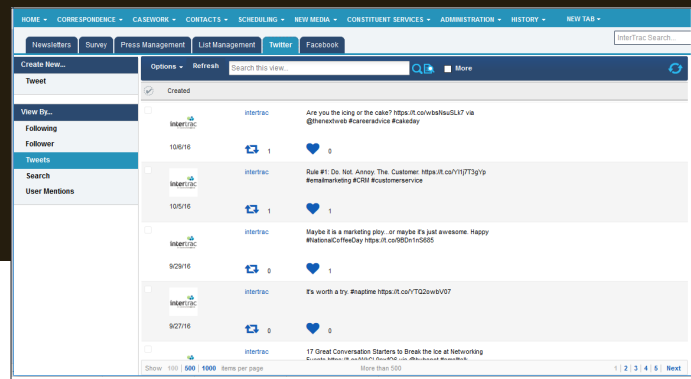




# Thursday

is the best day to send a press release, with an average 27% open rate. The next best day is Tuesday with a 19% open rate.

from "Best Day and Time to Send a Press Release [A Guide for 2022]" by Ofelia Fiume, Review 42



## 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 Hall Tracking

- Integrate with Broadnet Access Live\* via API
- 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

\*ComputerWorks is a Broadnet partner and Access Live reseller. Telephone town hall calls are priced separately by event.





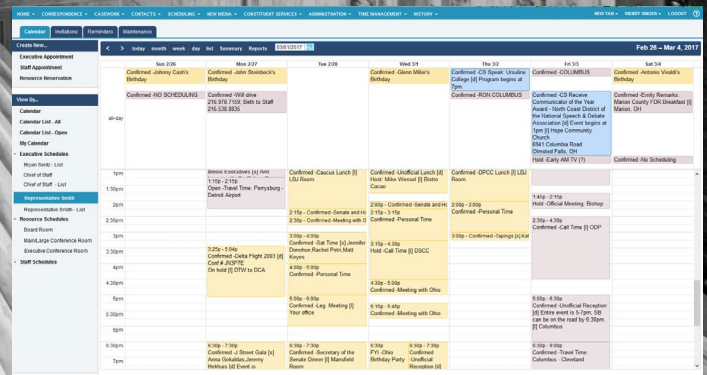
# SCHEDULING

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 CRM 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 management; group calendars for the departments and office locations; individual staff calendars; and resource reservation calendars to track who is using the conference room or media equipment. Additionally, executive calendars can be locked down so that only users with scheduling rights 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





# CONSTITUENT SERVICES

## Let them know you're listening

Constituents may contact your office for assistance with a number of things, whether it's applying for an internship, board appointments, or Freedom of Information Law requests.

**intertrac has you covered. We specialize in bringing your custom and unique forms and workflow processes into the system. intertrac can accommodate anything you already do on paper.**

Standard forms include a Call Center form where you can log incoming and outgoing phone calls, an Opinion form for tracking incoming calls and evaluating complaints or issues in real time.

Other workflow processes manage internal projects. And sensible forms, built-in calendars, calculators, and on-point communications help you keep track of it all.

Options	Hot Topic	Date Received	Category	Support	Oppose	Comment	No Opinion	Total
Clean Energy Act	06/22/2016	Rockland	Judiciary	0	0	1	0	1
Clean Energy Act	06/22/2016	Rockland	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Rockland	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Current & Events	0	0	1	0	1
Clean Energy Act	06/22/2016	Rockland	Judiciary	0	0	1	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Judiciary	0	0	1	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Rockland	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1
Clean Energy Act	06/22/2016	Westchester	Judiciary	0	0	1	0	1
Clean Energy Act	06/22/2016	Westchester	Defense & Military	0	0	0	0	1

Subject	Category	Date
ESL/English Support Plan	Not Categorized	Aug 6, 2019
Urges Senator to support S 1243	Urges Senator to support S 1243	Aug 6, 2019
Dear Colleague Letter	Dear Colleague Letter	Aug 6, 2019
Aspen Grove P 2015	Aspen Grove P 2015	Oct 22, 2017
10.10.17 Invoys-Devin: House shipbuilding budget FY18	10.10.17 Invoys-Devin: House shipbuilding budget FY18	Oct 22, 2017
10.10.17 Lashy-Devin: FY18 State, Foreign Operations basic education activities	10.10.17 Lashy-Devin: FY18 State, Foreign Operations basic education activities	Oct 22, 2017
10.21.17 Lashy-Devin: Basic education activities in FY18 State, Foreign Operations report	10.21.17 Lashy-Devin: Basic education activities in FY18 State, Foreign Operations report	Oct 22, 2017
10.23.17 Lashy-Devin: Transportation funding in State, Foreign Operations Appropriations bill	10.23.17 Lashy-Devin: Transportation funding in State, Foreign Operations Appropriations bill	Oct 24, 2017
Defense	Defense	Aug 31, 2017
12.11.17 Sen. Inouye & Rep. Hironaka: FY18 Defense Appropriations Conference Report	12.11.17 Sen. Inouye & Rep. Hironaka: FY18 Defense Appropriations Conference Report	Aug 31, 2017
3.10.18 ALL SENATE: Members Meeting on Joint Strike Fighter Alternative Engine Program	3.10.18 ALL SENATE: Members Meeting on Joint Strike Fighter Alternative Engine Program	Mar 17, 2018
3.24.18 Invoys-Devin: DOD Peer Reviewed Orthopaedic Biomechanics Research Program FY18	3.24.18 Invoys-Devin: DOD Peer Reviewed Orthopaedic Biomechanics Research Program FY18	Apr 20, 2018
4.11.18 Invoys-Devin: DOD PCRP FY18	4.11.18 Invoys-Devin: DOD PCRP FY18	Apr 20, 2018
4.11.18 Invoys-Devin: GIVUSP FY18	4.11.18 Invoys-Devin: GIVUSP FY18	May 10, 2018
4.11.18 Invoys-Devin: ISAF FY18	4.11.18 Invoys-Devin: ISAF FY18	Apr 20, 2018
4.11.18 Invoys-Devin: Houthelone FY18	4.11.18 Invoys-Devin: Houthelone FY18	Apr 20, 2018
4.11.18 Invoys-Devin: HSP FY18	4.11.18 Invoys-Devin: HSP FY18	Apr 20, 2018
4.11.18 Invoys-Devin: HETRP FY18	4.11.18 Invoys-Devin: HETRP FY18	Apr 20, 2018
4.14.18 Invoys-Devin: DOD manufacturing research-development initiatives FY18	4.14.18 Invoys-Devin: DOD manufacturing research-development initiatives FY18	Apr 24, 2018

## Knowledge Center

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 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.

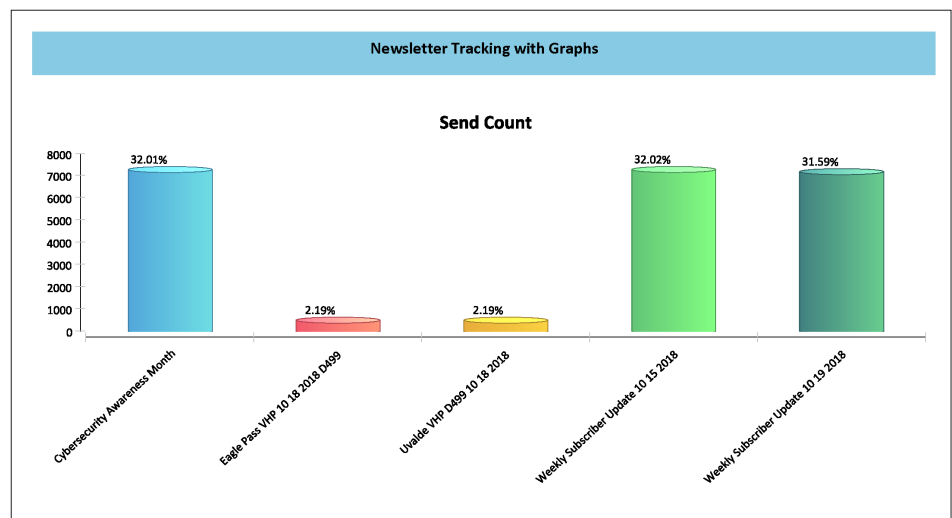


# Reporting

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 us. Because we continuously enhance the system based on user feedback, intertrac is actually a system that our user community helped design. And we make sure intertrac works exactly for YOU.

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