intertrac SCHEDULING

BY COMPUTERWORKS

The intertrac Scheduling module is a robust tool for managing meetings, appointments, activities and events for a Senate Office. It includes executive and staff appointments, resource reservations, and invitation requests, all in a visual interface that is easy to use and looks like a calendar and a date planner.

intertrac Scheduling is an add-on solution that tightly integrates with our CSS Package to store information related to meetings, appointments, events, and activities and associate it to constituents, staff, and casework. The calendar views give you a variety of ways to examine that 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. Drag-and-drop editing lets you easily reschedule appointments. And the navigator makes it easy to switch between calendars.

FEATURES

- Includes forms for appointments, events, anniversaries, and activities, resource reservations, reminders, and invitation requests
- Create and manage multiple staff, executive, and group calendars, as well as personal calendars
- Crossover capability automatically creates the entry on every related executive, staff, resource schedule, and/or group calendar when you save an appointment
- Standard intertrac features like the full-text search are available in every view for pinpointing data
- The Calendar integrates with Outlook Calendar, and through Outlook to handheld devices (smartphones, tablets, etc.)
- Automated reminders can be set for any appointment
- Appointments can be set for any standard time zone
- Repeating appointments can be daily, weekly, monthly, or custom
- Any appointment can be associated to a contact and/or case
- Includes standard reports for calendar and invitation lists, index cards, etc.

EXECUTIVE **APPOINTMENTS**

- Secure calendars for scheduling the Senator, Chief of Staff, and State Director
- Staff can be assigned to the appointment, activity, or event
- Private appointments can be hidden
- Check Schedule button lets you quickly check the schedule before making an appointment

STAFF **APPOINTMENTS**

- The entry will display on the group calendar and/or personal calendar for the staff member
- Many staff members can be assigned to the same calendar entry
- Automated notifications alert staff to upcoming appointments and assignments

RESOURCE **RESERVATIONS**

- Schedules for reserving conference rooms, media equipment, etc.
- Configurable for your office's unique resources
- Reservations can be created via an executive or staff entry, or as a standalone document
- Reservations can be set as repeating appointments

INVITATION **REQUESTS**

- Track invitations and appointment requests for the Senator in a separate schedule
- Indicate whether the Senator, outreach staff, or a surrogate will attend the event
- Notify key decision makers with the FYI tool
- Accept or decline the request
- Link a written or email response to the invitation
- Promote accepted invitations to the assigned executive, staff, and/or group schedule(s)

REMINDERS

- Reminder activities can be created from another document or as a standalone entry
- A Reminder created from another document includes a DocLink to the original
- Reminder alerts are included in the automated Smart Notifications sent to staff
- Check your Reminders right on the Office Page when you log in every morning

With intertrac Calendar, an office can maintain as many different calendars as needed. So you could 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, media equipment, etc.

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