

Basic Idea

MLS Boomerang is designed to add onTrackCRM tracking into the Auto Email feature of Matrix. Here are the similarities and differences;

Similar

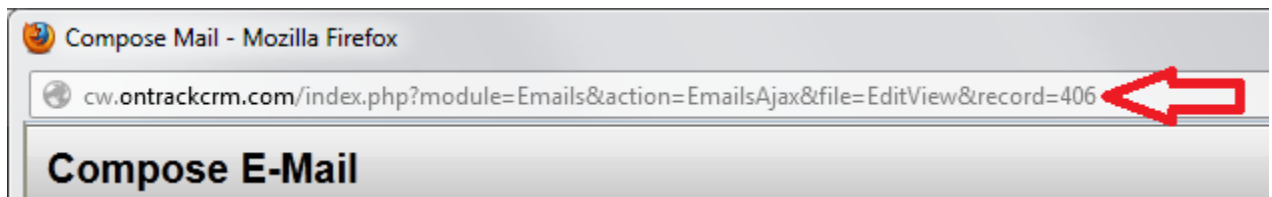
- Client receives a link to the Matrix Client Portal
- All features of the Matrix Client Portal will still work (i.e. Favorites, Rejected, etc.)
- The concierge service will still send an email to you first. The listings you approve will be sent through the MLS Boomerang

Different

- onTrackCRM tracking will be added to the update emails so you can fully track your clients activity / interest
- You can compose a custom email message to your client

Compose an Email in onTrackCRM

- In onTrackCRM, go to the contact record that will receive updates
- Compose an email that your client will receive. (**Hint:** Start with the Sample Email below)
- Get the ID for the email you just wrote.
 - Find the email you just composed
 - Click edit to the right of the email
 - Take down the record number shown in the address bar (i.e. record=406, 406 is the Email ID)



Sample Email

The sample email below is loaded as a Template in your ontrack email editor. Click **Select Email Template** button and click on the template called BOOMERANG:

If you want to copy and paste, click the Source button on your onTrackCRM email editor, then paste the Subject and Body below . After pasting click the **Source** button again to see the email in the visual editor.

Subject	Updated properties in \$custom-mls_subject\$ updated on \$custom-mls_updated\$
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Body	Hi \$contacts-firstname\$, Click here to view updated property information Sincerely, \$users-signature\$
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MLS Boomerang Merge Tokens

Token	Used for
\$custom-mls_url\$	This must be present for MLS Boomerang to work. Paste it into a hyperlink in your email
\$custom-mls_subject\$	Subject of email sent by MLS
\$custom-mls_updated\$	Date & Time update email was received from MLS. This is useful for gmail recipients because it will prevent emails from being grouped together as one conversation
\$contacts-firstname\$	First name on contact record
\$users-signature\$	Your email signature is not added by default. This token must be present for the email to contain your signature.

Configure Matrix

Create a Contact Record in Matrix

- Navigate to My **Matrix** > **Contacts**
- Click Add at the bottom of the screen
- Complete the Personal Information form
 - First Name: Your client's first name
 - Last Name: Your client's last name
 - Email Address: Email format is mls+instance@ontrackcrm.com, where **INSTANCE** is the name of your ontrack install

Example: if your ontrack install was **mycrm.ontrackcrm.com**, then you would enter the email **mls+mycrm@ontrackcrm.com**.

- Click Save

Create an Auto Email in Matrix

- In Matrix, construct a search as desired and click Results at the bottom of the page
- Click **Save** > **New Auto Email**
- Select the Contact you created in the previous step
- Enter a subject for the email update.
 - **NOTE:** If you are using the token \$custom-mls_subject\$ in your onTrackCRM email, it will be replaced by the Matrix subject line

- In the Message field, enter the ID for the email you composed in onTrack during the 1st step. The format must be exact
 - In the example in step 1, the Email ID was 406. The Email ID must be entered in the Matrix Message field using the format;

email:406;

Subject:	Enter desired subject
Message:	email:406;

- Select the schedule you would like updates delivered on
- Click **Save**

Advanced Topic

It is possible to send the same Matrix Auto Email to multiple onTrackCRM emails

- In the Auto Email message body described above, enter multiple Email IDs separated by commas(,)

email:406,745,823;