

Objective

The Offline Marketing Code feature in onTrackCRM provides a simple unique code that can be used in an offline mailer to electronically deliver a document, such as a CMA. There are two objectives; First, deliver the document. Second capture the email address of the recipient.

How it Works

On a physical marketing piece (i.e. mail piece, post card, door hanger, flyer, etc.) you provide a website address and a unique code for the client you are targeting. In order to receive the information advertised (i.e. CMA), the recipient visits the website, then enters their unique code and their email address. An email containing the advertised content is immediately sent to them and their email address is stored in ontrack.

Initial Configuration for Offline Marketing

Compose Your Delivery Email

On any contact record, compose an email that will deliver the content you will advertise. Within the email body include a hyperlink with the special token **\$custom-cma_url\$**. Any standard token can be used to make it specific to the recipient.

Example Email Subject

Your requested CMA for \$contacts-mailingstreet\$, \$contacts-mailingcity\$

Example Email Body (Click the Source Button in the editor before pasting the HTML code below)

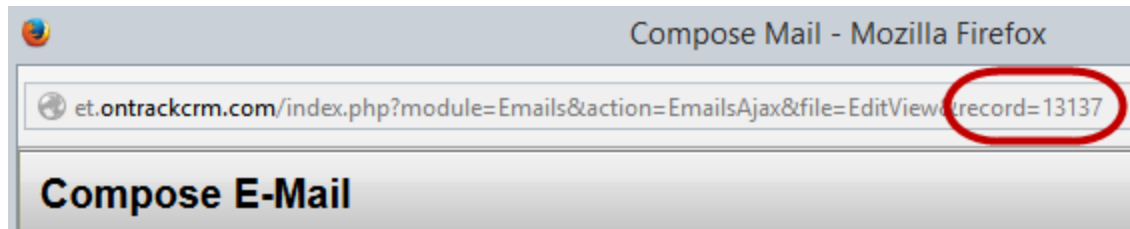
```
Hi $contacts-firstname$,<br /><br />Click the link below to download the
CMA for your property at $contacts-mailingstreet$,
$contacts-mailingcity$<br /><br /><a href="http://$custom-cma_url$">Click
here to download CMA</a><br /><br /><br />Sincerely,<br
/>$users-signature$<br /><br type="_moz" />
```

If you composed this email on your own contact record, send it to yourself to see how it looks.

NOTE: The link will not work until you enter a code on the website later.

Obtain the Email ID

To obtain the Email ID for your delivery email, simply edit it and record the number at the end of the URL. Record it for use in the next step. In the example below the Email ID is **13137**.



Forward Offline Marketing URL to Landing Page

A simple easy to type URL should be selected and registered for use on offline marketing pieces so that it is easy for recipients to visit the landing page.

Example Domain

VALUEREPORT.ORG

is forwarded to

`http://et.ontrackcrm.com/cw/cma/index.php?emailid=13137&key=XXXXXXXX`

- `et` is replaced by the ontrack instance containing the document and contact you are targeting
- `emailid=13137` is replaced by the email ID you composed in the previous step
- `key=XXXXXXXX` is replaced by your access key from your account in ontrack

Obtaining your access key

- Log into ontrackcrm
- Click **My Preferences**
- The access key will be in section **5. User Advanced Options**

Additional Options

The following parameters can be appended to the URL shown above.

`&redir_success=http://anywebsite.com`

On success redirects to the website specified in red. NOTE: The website URL cannot contain the symbols ? or &

`&redir_failed=http://anywebsite.com`

On error redirects to the website specified in red. NOTE: The website URL cannot contain the symbols ? or &

`&stream=Market Update`

Specify the text appearing at the bottom of the ontrack stream notification

Configure Domain Forwarding in Godaddy

- Access your domain in Godaddy
- Click the **Manage** link next to Forwarding
- Enter the ontrack landing page above (replace the beginning ET with your ontrack install and replace the Email ID)
- Select **Forward with Masking**
- Enter a title of your choice. This will display as the web browser tab title
- Complete the form and add forwarding

Add Forwarding

* Required

Forward to: * Preview
http://

Redirect type: * ⓘ

301 (Permanent) 302 (Temporary)

Forward settings: * ⓘ

Forward with Masking

Title: ⓘ

Home Value Report

Description: ⓘ

Keywords: ⓘ

Update my nameservers and DNS settings to support this change.
(Recommended)

Add

Cancel

Market to a Specific Contact

Create a Document

- In onTrackCRM, navigate to the contact record you will send the Offline Marketing
- Scroll down to the **Documents** section
- Click **Add Document**
- Enter a **Title** for the document
- Select **Internal** in **Download Type**
- **Browse** and select the PDF (i.e. CMA Report) that will be delivered to this contact
- After uploading, the page will refresh. Scroll down to the document that was just added to obtain the unique code

Use Case: Ideal method to deliver a CMA to a homeowner that you do not already have an email address for.

Offline Marketing Piece

Using the example above, you would include the following information in your marketing piece;

- Website to visit: **ValueReport.org**
- Code to retrieve your value: **QBZ**

Repeat for Each Contact

Each contact record must have their own document uploaded in order to obtain a unique code.

Create a Mailing List

Create a Document

- In onTrackCRM, navigate to **Marketing > Documents**
- Click the green plus icon to create a new document. NOTE: For a mailing list, the document does not need to be linked to a specific contact record.
- Enter a **Title** for the document
- Select **Internal** in **Download Type**
- **Browse** and select the PDF (i.e. CMA Report) that will be delivered to this contact
- After uploading, the page will refresh. **DO NOT Use the unique code shown on the document page**
- Click **Link to Campaign** on the right margin of the page
- A list of available campaigns will appear
- Click **Link** or **Update** for the desired campaign
- Click the name of the campaign to obtain a mailing list that can be copied and pasted into Excel and used for a mail merge

NOTE: Each contact name on the mailing list has a unique code for this document.

Use Case: Ideal for mailing market updates to an entire neighborhood

Advanced API Usage

onTrackCRM Offline Marketing supports the use of any landing page, which can be hosted on any web service provider.

Simple HTML Form

Create your HTML form with either POST or GET method. Replace the ET (shown in red) with your ontrack address.

```
<form action="http://et.ontrackcrm.com/cw/cma-api.php" method="post">
```

Hidden Input Configuration

Include the following hidden inputs to configure your form.

Specify that the API should send the document to the site visitor.

```
<input type="hidden" name="send" value="">
```

Provide your onTrackCRM API Key. This can be found in My Preferences > Access Key

```
<input type="hidden" name="key" value="REPLACE WITH ACCESS KEY">
```

Specify what page to load if the submission succeeds or fails

```
<input type="hidden" name="redir_success" value="http://et.ontrackcrm.com/cw/cma/success.html">
```

```
<input type="hidden" name="redir_failed" value="http://et.ontrackcrm.com/cw/cma/failed.html">
```

Specify what will appear in the onTrackCRM stream when the document is retrieved

```
<input type="hidden" name="stream" value="CMA Retrieved">
```

Specify the Email ID that will deliver the document.

```
<input type="hidden" name="emailid" value="13137">
```

Text Inputs

Your form must include a text input to enter the Offline Code and an email address. The input names must be as shown below.

```
<input type="text" name="code" value="Enter your Report Code here" />
<input type="text" name="email" value="Enter your email here" />
```

Website Builders

Compatible HTML Code has been developed for the following website builders.

- [Weebly](#)

Physical Content Pieces

For ease of use it is recommended to use a short and simple URL that is relevant to your marketing message. It is also recommended to provide a QR code printed on marketing pieces, making it easier for mobile users to quickly access the landing page.

Marketing Pieces

You can find premade marketing pieces [here](#)

QR Code Generator

There are many free generators available.

- <https://www.the-qrcode-generator.com/>