



RealtyJuggler Synchronization Tutorial



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RealOrganized™, Inc.

Organizational Software for Real Estate

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Introduction



RealtyJuggler Real Estate Software is an Internet cloud-based service. This means that you can access your information from any internet equipped device using a modern web browser (Safari, Google Chrome, Microsoft Edge, Firefox etc.). Sign in using a Mac, PC, iPad, iPhone, or Google Android device. RealtyJuggler is especially suited for tablet devices such as the Apple iPad and Android Tablets.

In addition to direct web access, you can also synchronize your contacts and appointments with any smartphone or tablet device using our Google synchronization technology.

Google Synchronization of Contacts & Calendar



The Google Sync capability is available by going to:

Main:Settings:Google Sync.

We recommend that you review Video Tutorial 40 for a detailed walk-through of the Google synchronization procedure. A link to that video is available at the bottom of the Google Sync screen.

Sync Contacts & Calendar with any Smartphone



Once your RealtyJuggler contacts and calendar have been synchronized with Google, they can be viewed and edited from any smartphone using Google's Sync services. You can use a free Gmail account, or your own custom domain name (Google Workspace).

Supported devices include: **Android, iPhone, iPad, Apple Contacts, Linux and others.**

RealtyJuggler can synchronize your Contacts, and Appointments with Gmail Contacts and Google Calendar. To do that, go to the **Main:Settings:Google Sync** section of RealtyJuggler and follow the


instructions on that screen. Additional help is available by clicking on the link for Tutorial 40 at the bottom of that screen.

RealtyJuggler does a two-way synchronization, which means that if you make a change to a contact in Google, that change is reflected in RealtyJuggler. Similarly, a change in RealtyJuggler is reflected in Google.

Automatically Save Changes To Google

There is a checkbox in the Google Sync screen that allows you to specify if you would RealtyJuggler to automatically update Contacts and Calendar to Google. If you check this off, changes within RealtyJuggler are immediately saved to Google. In order for this to operate, you must have completed a normal sync using the "Start Sync" button. Additionally, you must have "Two-Way" sync as your sync setting.

Auto Save To Google:

 **Google Sync needs your attention.** [Click here to Start Sync.](#)

Changes made within Google are automatically detected within RealtyJuggler. However, these changes are not automatically updated. Instead, a message is displayed at the top of the RealtyJuggler Contacts and Calendar informing you of these changes. Click on the "Click here to Start Sync" link in that message to initiate synchronization. This is a safety precaution to prevent accidental deletion or duplication of your contacts and calendar.

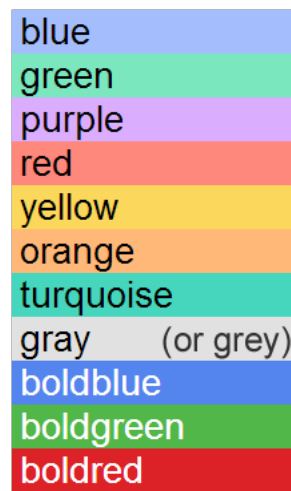
Setting an Event Color for a Google Appointment

Categories:

Event color 

Google Appointments can be assigned an

individual event color from Google. These colors are translated into RealtyJuggler categories with the category name matching the color name. This can be a handy way to categorize your Appointments in such a way that the categories are displayed visually within the Google Calendar. Colors can also be used to specify which team members are assigned which appointments. Or, assign different colors for different kinds of appointments - one color for showings and a second for prospecting activities. The easiest way to see how this works is to create a few appointments from Google and assign colors to these appointments. Synchronize with RealtyJuggler and see the category colors that show up as categories. The list of color names are as follows: blue, green, purple, red, yellow, orange, turquoise, gray, boldblue, boldgreen, boldred.



Synchronize Categories with Google Guests

Synchronize Categories with Google Guests:

Categories: ▼ test@testemail.com

The Google Sync screen has a checkbox titled "Synchronize Categories with Google Guests". This is useful for teams who would like to assign individual appointments to specific team members using the Attendees field within a Google appointment. Enter the email address of the attending team member into the RealtyJuggler Categories field of the appointment and Google Sync will add that email address to the Attendees list of the appointment.

Add guests

Enter email addresses

Add

[Make some attendees optional](#)

Guests

[Email guests](#)

test@testemail.com*

×

* Calendar cannot be shown. [Why?](#)

Guests can

modify event

invite others

see guest list

Troubleshooting Google Sync

If you are getting an error about authentication, cookies, or the wrong account, then we recommend the following steps:

1. Sign into Gmail and then log out of Gmail, so that you are no longer logged into Google at all
2. Go to **Main:Settings:Google Sync** and start sync. When you see your error, click on the "Log Out of Google" button.
3. Follow instructions in Video Tutorial 40 to sync RealtyJuggler with your Google Account. You will need to sign into your Google Account again. Make sure that the account you grant access to is the same one that is listed in the Google Sync screen in RealtyJuggler.
4. The Grant Access and Sync procedure is fluid and will go from the Google Sync screen, to the Google Sign In Screen to the Grant Access screen, and then back to the Google Sync, all automatically based upon completing the step requested.

If you are getting an error regarding a specific Contact or Appointment:

1. Take a look at that specific contact or Appointment in Google. A common problem is invalid characters in the Notes field. This can happen when copying and pasting an email into the notes field that contains HTML or other unrecognizable characters. Cleaning out invalid characters from Notes fields and replacing them with plain text can solve this issue.
2. Google has a limit of around 20,000 characters for the notes field. If your notes field is longer than this limit, you may see an error regarding **quota exceeded**. To resolve this problem, trim your notes length and start sync again.

If you are still having problems, give us a call at (970) 672-3467 and we can troubleshoot over the phone.

Google Workspace

You can synchronize RealtyJuggler contacts and Calendar with a standard Gmail email address. You can also synchronize with a vanity domain like agent@superagent.com by using Google's upgraded Google Workspace product. You can set up a Google Workspace account here:

<https://workspace.google.com/>

Gmail can also read email from other email accounts. Here's a link that describes how to do that:

<https://mail.google.com/support/bin/answer.py?answer=21288>

Android

Android devices are automatically connected to Gmail/Google Apps. There is no special configuration necessary to allow them to work with RealtyJuggler.

RealtyJuggler synchronizes with all of the fields that you see in the General tab in a RealtyJuggler contact record as well as the three mailing addresses in the Address tab. This includes spouse name, children's names, birthdays and anniversaries.

You can limit which contact groups are visible on your Android device. From your Android device, open the Contacts app, head to the Contacts tab, and hit the Menu button. Select the "Display options" item. From this screen, you can choose which accounts to sync, and which sub-groups inside those accounts you want to have shown.

Some android phones will not display the "Spouse" field for a contact record. RealtyJuggler does synchronize this field with Gmail/Google Workspace and you can verify that this data is present by looking at your contact record from Gmail on your computer's Internet browser. However, the phone manufacturer may decide that this information is not worthy enough to be displayed. You should contact your phone manufacturer regarding the specific limitations of your individual device. These specifications vary from phone to phone.

Apple iCloud

RealtyJuggler does not synchronize with iCloud. Instead, we recommend that you use Google Sync to synchronize RealtyJuggler with all your Apple devices including the iPhone, iPad as well as Apple Macintosh. Google Sync uses the same underlying synchronization technology as iCloud, and has the additional benefit of being able to synchronize with third party products like RealtyJuggler. You can export your Contacts and Calendar from iCloud into RealtyJuggler using these instructions:

<https://www.realtyjuggler.com/Import#iCloudContacts>

You can then synchronize all your Apple devices with Google Contacts and Calendar and RealtyJuggler Google Sync. Video Tutorial 40 shows how that tool works.

Using a Third-Party iCloud Tool

There is a third party tool called "Contacts Sync for Google Gmail with Auto Sync" by Playa Software which will synchronize a Gmail account with an iCloud account. This third party App is available in the Apple App Store and costs less than \$10. Follow the steps below to install the app and configure your synchronization:

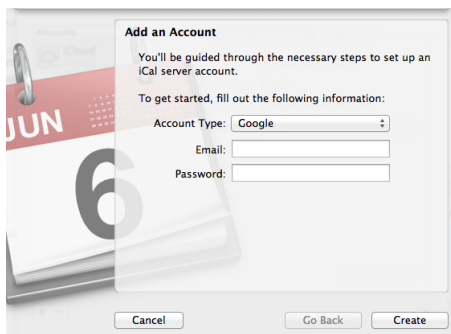
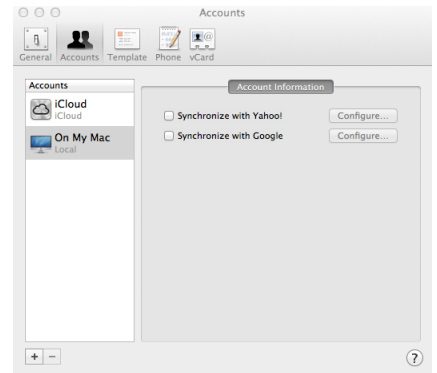
1. Download the "Contacts Sync for Google Gmail with Auto Sync" App from the App Store on your iOS device.
2. Go to *Settings > Mail, Contacts, Calendars* and tap on your iCloud account. Make sure the Contacts synchronization is enabled for that account by moving the slider to the right so it is green. *Note: If you have a Google account on the device, you should disable the Contacts synchronization within the Gmail account section.*

3. Launch the Contacts Sync App on your phone and sign in to your Google account to grant permission for the app to sync with the Google Contacts.
4. Select 2-way Sync. The results of the synchronization will be calculated and displayed for your confirmation. If the changes look correct, press "Continue" in the upper-right corner of the screen. Your Google Contacts and Groups will now be displayed in the Contacts app on your iPhone/iPad.

Apple Macintosh

To synchronize Apple Contacts with Gmail/Google Apps:

1. Launch Apple Addressbook.
2. Select "Preferences" menu from the "Address Book" menu.
3. Click "Accounts", choose "On My Mac" in your list of accounts, and then click "Account Information".
4. Select the "Synchronize with Google" checkbox.
5. Enter your Google / Google Apps email address and password, and then click OK.
6. You can sync only one Google account.

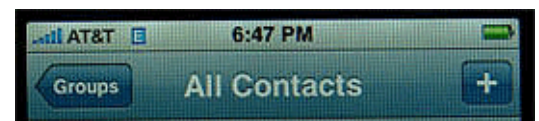


To synchronize Apple iCAL with Gmail/Google Apps:

1. Launch Apple iCal
2. Select "Preferences..." menu item from "iCal" menu.
3. Click on the + icon in lower left corner of window to create a new account
4. Select "Account Type:" of "Google".
5. Enter your Gmail or Google Apps email address and password

Apple iOS Devices (iPAD, iPhone)

1. Follow Google's instructions for connecting your iOS device to **Google Contacts**. We have provided a link below to Google's instructions for how to do this:
<https://support.google.com/mail/bin/answer.py?hl=en&answer=2753077>
2. Follow Google's instructions for connecting your iOS device to **Google Calendar**. We have provided a link below to Google's instructions for how to do this:
<https://support.google.com/calendar/bin/answer.py?hl=en&answer=151674>
3. To view the contacts on your iOS device, go to the contacts list on your iOS device. At the top, you may see the words "All Contacts". If you do, tap on the "Groups" icon at the top. Tap on the group that represents your Google Contacts.



Note: The iOS 16 upgrade changed “Groups” to “Lists”. Lists are confined to your Default Contacts account, which can be changed to Google by going to Settings > Contacts > Default Account on the phone.

4. Once you are satisfied that your iPhone/iPAD is synchronizing with Google, then continue to next step. You should wait at least 1 hour to make sure that all background synchronization has completed.
5. Follow the instructions in Video Tutorial 40 to connect RealtyJuggler to Google contacts.

Searching your Google Gmail



RealtyJuggler allows you to search all of your Sent and Read email that is stored in Gmail. To do this:

1. Click on one of the Deal icons (Prospect, Buyer, Listing, Closing) or the Contact icon on the main screen.
2. Go into one of the records. **You should now be looking at information for a single deal or person.**
3. Click on the Mail tab on the left.
4. Click on the link at the bottom of that screen called "Google Gmail Search".

A screenshot of the Gmail search interface. At the top left is a blue "Done" button. Below it are three search filters: "Search Name: All", "Search By: Email Address or Name", and "Search For: All Emails". At the bottom left of the search area is a "Do Gmail Search" link with the Google logo.

From there you can select the particular filter criteria you want by clicking on the "Do Gmail Search" link to start the search. This capability requires that you have set up Gmail Sync located at **Main:Settings:Google Sync**.

Using Gmail/Google Apps with Third Party Email Accounts


It is possible to both read and send emails using Gmail/Google Apps that are not Gmail email addresses. This can be done using POP3 and SMTP technology. The below links are from Google and describe this procedure:

<https://support.google.com/mail/bin/answer.py?hl=en&answer=13273>

<https://support.google.com/mail/bin/answer.py?hl=en&answer=22370>

Synchronizing Birthdays and Anniversaries

Each contact record in RealtyJuggler contains slots for up to 9 Birthdays and Anniversaries. These events are displayed in **Main:All Tasks** and allow you to mark them done as you wish people a Happy Birthday or Anniversary. The AutoTasks can even help you address Birthday cards.

 **Video Tutorial 44 - Touch Cycle** provides a detailed description of how to wish your Contacts a Happy Birthday or Anniversary.

Adding Birthdays to your Calendar (Option 1)

By default, Birthdays and Anniversaries are displayed in your All Tasks list. If you would like to add Birthdays and Anniversaries to your calendar as well, you can click on the blue drop-down arrow to the left of the Birthday date. Select "Add to Calendar" to have the repeating appointment added. You can turn on an alarm so that you receive an email notifying you of the upcoming Birthday. To enable this option, check off the "Alarm" checkbox in the Appointment.

 **Video Tutorial 47 - Calendar** has instructions on how to add dates to your calendar.

Adding Birthdays to Calendar using Google Sync (Option 2)

If you are using Google Sync there is another option that is available for adding Birthdays and Anniversaries.

1. You must synchronize Contacts to enable this feature as Birthday and Anniversary events are stored and edited within the Contact record.
2. Sign into your Google Calendar. On the left, you will see a calendar labeled "Birthdays". This calendar contains the Birthdays for your contact records. You can hide or show this calendar by clicking on the calendar name. There is one limitation of this approach - it only displays a single birthday for each contact record. If you have spouse birthday, children birthday, closing anniversary, these dates will not display using this technique.

Setting Alarms/Reminders for Appointments

Email Alarms

You can have an email reminder sent to you a few minutes before an appointment. If you click on an appointment in **Main:Calendar** you can check the "Alarm" check-box. If you would like to set a policy for all of your appointments for such an alarm, you can go to **Main:Settings:Preferences:Calendar**.

There is a default setting available on that screen which will be used when any new appointment is created.

SMS Alerts

RealtyJuggler provides SMS alerts for your Task and Appointment notifications through our partner Twilio.com. Once you sign up for a Twilio account and choose a phone number, you'll be able to connect it to your RealtyJuggler account on the Main:Settings:Preferences:Phone page. Please give us a call at (970) 672-3467 for help with the setup.

Whitelisting RealtyJuggler

We recommend that you add

Administrator@RealtyJuggler.com

To your email whitelist. That way, when we send you notification of expiration of your account, or any other notifications, these emails end up in your Inbox and not your Junk Mail folder. This link has instructions for how to do that:

<https://www.realtyjuggler.com/WhiteList>

In most cases, all you need to do is to add our email address to the address book of your email program.

VIP Email / Priority Inbox

In addition to whitelisting our email address, we also recommend that you add

Administrator@RealtyJuggler.com

To your email VIP / Priority Inbox for your smartPhone. This will allow your smartphone to vibrate or play a special sound when emails from RealtyJuggler.com arrive. This is a great way to be notified when leads from your websites (Zillow, Realtor.com and any other websites you use) have been automatically added to RealtyJuggler via the Email Feed. On the iPhone, this feature is called VIP. For Android, this feature is called Priority Inbox.

Accessing RealtyJuggler Using any Modern Web Browser

RealtyJuggler is built using modern web standards. As a result, you can access RealtyJuggler on any device that has a modern web browser. That includes a PC, a Mac, as well as modern smartphones such as the Apple iPad, Apple iPhone, Palm Pre, Google Android, and Microsoft Windows Phone 7. When accessing RealtyJuggler on one of these devices, phone numbers are displayed with a phone icon to the right of them. Tap on that icon and RealtyJuggler will dial the phone number for you. Additionally, some columns are collapsed to provide a more efficient interface and the tabs to the left of the screen are collapsed into a drop-down menu.

Accessing RealtyJuggler Using Apple iPad, iPhone, Android or Netbook


RealtyJuggler has been optimized to run on limited resolution devices like the Apple iPad or Netbook. Just sign into RealtyJuggler using the web browser (Safari) and you are all set. The iPad is particularly suited for real estate professionals as it has wireless internet access and is portable. The screen size is far larger than that of a smartphone, allowing for productive work while you are out in the field.

To synchronize your contacts and calendar with iPad, follow the instructions below.

<https://www.google.com/support/mobile/bin/answer.py?hl=en&answer=138740>

Placing an Icon of RealtyJuggler on Your Desktop

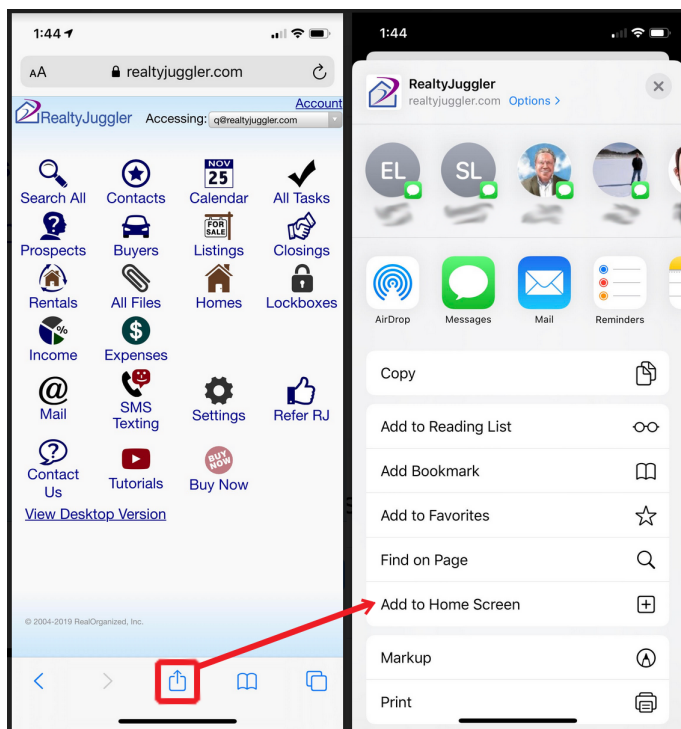
It can be convenient to have an icon of RealtyJuggler on the desktop of your computer. That way, you can double-click on that icon to launch RealtyJuggler immediately. Below are instructions on how to do that:

1. Go to <https://www.realtyjuggler.com> and sign into your account.
2. If your RealtyJuggler window takes up the entire screen you will want to make that window a little smaller so you can see your Desktop. To do this, click on the middle zoom icon in the upper-right corner of the window to shrink the size of the window - that's the icon directly to the left of the large red X. If you are using a Macintosh, you can click on the green icon in the upper-left corner of the screen to do the same thing. 
3. At the top of the screen you will see the <https://www.realtyjuggler.com/main> web address. Immediately to the left of that web address you will see a padlock icon. Click and drag this icon to your desktop. A large icon will appear on your Desktop called RealtyJuggler. If you double click on that icon, you will go immediately to RealtyJuggler.

Installing RealtyJuggler App icon on an iPhone or iPad

If you would like to install RealtyJuggler as an App icon on the home screen on your iPad or iPhone follow the steps below:

1. Sign into your RealtyJuggler account using Safari web browser
2. Touch the Bookmark icon (on iOS 4.0 or later it looks like a box with an arrow out of it and while earlier iOS devices it looks like a +) The position of the icon will vary depending on the size of your screen as well as the orientation of the device.
3. A drop-down menu will appear. Scroll down and touch the menu item "Add to Home Screen"



Installing RealtyJuggler App icon on an Android Device

If you would like to install RealtyJuggler as an App icon on your Android smartphone or tablet follow the steps below:

1. Sign into your RealtyJuggler account using the Chrome browser on your Android device.
2. Tap on the three dot settings menu in the upper-right corner of the browser.
3. Select "Add to Home Screen".

Create a RealtyJuggler Icon on Your Desktop Using Google Chrome

Instead of the browser icon, you can place a RealtyJuggler icon on your Windows or Macintosh desktop by following these instructions:

Log into RealtyJuggler using Google Chrome. Click the 3 stacked dots at the top right of browser window. Click the More Tools, which will be near the bottom of the list of options. On the More Tools menu, select "Create Shortcut..." This will place a RealtyJuggler icon (House with a boomerang coming out of it) labeled "RealtyJuggler".

Synchronization of Tasks

For mobile access to your tasks, we recommend using an iPad or tablet device. RealtyJuggler has been optimized for use on a tablet device and is the perfect companion for when you are out of the office.

Using RealtyJuggler to Dial Phone Numbers



There is an icon to the right of all of the phone numbers in RealtyJuggler. This icon looks like a phone handset. If you click on this icon, RealtyJuggler will dial the phone number for you.

Below is the list of compatible devices that you can use to make your phone calls.

Using Twilio SMS to Dial Phone Numbers from your Computer

1. Create a Twilio.com account and connect it to your RealtyJuggler account to enable SMS Alerts (see "SMS Alerts" on page 16 above).
2. Log into your RealtyJuggler account and go to **Main:Settings:Preferences:Phone**. Set your "Desktop Phone Dialer URL:" to the "Twilio Text Phone" option.
3. Once this has been configured, you can click on the miniature phone icon to the right of any phone number in RealtyJuggler, and RealtyJuggler will text that number to your mobile phone. Just tap on the number in the text message to dial from your mobile phone.

Using Twilio Voice to Dial Phone Numbers from your Computer

1. Create a Twilio.com account and connect it to your RealtyJuggler account to enable SMS Alerts (see "SMS Alerts" on page 16 above).
2. Log into your RealtyJuggler account and go to **Main:Settings:Preferences:Phone**. Set your "Desktop Phone Dialer URL:" to the "Twilio Voice" option.
3. Once this has been configured, you can click on the miniature phone icon to the right of any phone number in RealtyJuggler, and RealtyJuggler will call your mobile phone. You then press 1 and Twilio will connect you with the person you are calling.

Using your Android Phone to Dial Phone Numbers from your Computer

1. You must use Google Chrome browser on both your PC/Mac and your Android phone. Sync your Bookmarks for both your computer and Android phone using the same Gmail email address. To do that from your computer, click on the face icon to the right of the web address field and sign into your Google Gmail account and turn on Bookmark Sync. Turn on Bookmark Sync on your Android phone.
2. Log into your RealtyJuggler account and go to **Main:Settings:Preferences:Phone**. Set your "Desktop Phone Dialer URL:" to the "Tel:" option.
3. Once this has been configured, you can click on the miniature phone icon to the right of any phone number in RealtyJuggler, and RealtyJuggler will bring up a window allowing you to select

your mobile phone and will dial the phone using your computer. Make sure your Android phone is unlocked.

Making Phone Calls from Computer

1. Give us a call to configure Twilio (970) 672-3467
2. Go to **Main:Settings:Phone:Phone Settings** and select from one of the "Desktop Phone Dialer URL" options available. The "Twilio Text Phone" dialer will send a text message to your phone with the name and phone number of the person to call. Tap on the phone number from your phone to connect. The "Twilio Voice" dialer will call your mobile phone and when you press "1" will then call the person you want to speak with.

Making Phone Calls from an iPad, iPhone or Macintosh

3. You can make phone calls from a Mac, iPad or iPhone using a feature called *Continuity*. To configure Go to **Main:Settings:Preferences:Phone**. Select "tel:" from the "Desktop Phone Dialer URL:" drop-down menu.
4. Once this has been configured, you can click on the miniature phone icon to the right of any phone number to dial and call using your phone.

This capability is called Continuity and requires iOS8 or later and Mac OSX Yosemite or later.

Using Your Cell Phone to Dial Phone Numbers

1. Sign into RealtyJuggler from your phone's web browser.
2. Go to **Main:Settings:Preferences:Phone**. Select "tel:" from the "Mobile Phone Dialer URL:" drop-down menu.
3. Once this has been configured, you can click on the miniature phone icon to the right of any phone number to dial and call using your phone.

Using Skype to Dial Phone Numbers from your Computer

1. Go to **Main:Settings:Preferences:Phone**. Select "Skype +1" from the "Desktop Phone Dialer URL:" drop-down menu.
2. You will need to install the free Skype software as well. This software is located here: <https://www.skype.com>
3. The Skype software will install a click-to-call plug-in into your browser. Below is a direct link to that plug-in:

<https://www.skype.com/en/download-skype/click-to-call/>

4. Once this has been configured, you can click on the miniature phone icon to the right of any phone number to dial and call using Skype. The plug-in will also add links to all the phone numbers in lists and fields, so you can click on those links to dial as well.
5. **Skype Preview, which comes pre-installed on Windows 10 PCs, will not work. You must upgrade to the full version of Skype (which is free) for click to call to work.**

Using Vonage to Dial Phone Numbers from your Computer

Vonage has an extension that enables dialing of phone numbers from your web browser. Here's a link to information on that feature:

<https://www.vonage.com/business/business-cloud/features/click-to-dial/>

Using RingCentral to Dial Phone Numbers from your Computer

RingCentral has an extension that enables dialing of phone numbers from your web browser. Here's a link to information on that feature:

<https://support.ringcentral.com/app/phone/desktop-web/using-click-to-dial-feature-ringcentral-app-desktop-web.html>

Using any VOIP Dialer

RealtyJuggler can be configured to use the tel: protocol handler. Many VOIP services offer support for this handler in the browser. To configure, go to **Main:Settings:Preferences:Phone**. Select "tel:" from the "Desktop Phone Dialer URL:" drop-down menu.

Call Capture using Twilio

If you have configured a Twilio.com phone number with your RealtyJuggler account (SMS Alerts, page 16), you can display that phone number on a "For Sale" sign rider to provide 24 hour recorded home info for drive-by inquiries.

24hr RECORDED HOME INFO

Text "900" to (970) 294-7824
or Call (970) 294-7824 Enter Code 900

Click the "Call Capture" tab in any Listing record in RealtyJuggler to craft a prerecorded message describing the features of that Listing, and specify the code (900-999) your new leads will text, or call with, to receive information on that particular listing. If

there is a property website for the Listing, you can include the weblink there as well.

RealtyJuggler will alert you immediately via email and text message of any inquiries made this way, and will automatically add a new Prospect record with the Caller ID information.

If the lead leaves you a voicemail, a transcription of that message will be delivered to you via text, and the email notification will have the audio message.

Code:	900
Voice Description:	The home located at 123 Main St. has an asking price of \$260,000 . If you would like to speak with someone immediately about this home, press 1 . To leave a voice mail message about this home press 2 .
SMS Description:	Home For Sale 123 Main St. Asking \$260,000
SMS Link URL:	

You can customize the pre-recorded welcome message your leads will hear when they call by going to the Main:Settings:Preferences:Call Capture page in RealtyJuggler. This message will instruct them to enter the code from the sign rider for that listing, and give them options to leave you a voicemail, or even be redirected to your mobile phone.

Merge Duplicate Records

RealtyJuggler has the ability to merge duplicate Contacts, Prospects or Appointments. This option is available by clicking on the Merge Duplicates link at the bottom of the appropriate summary screens.



For the Prospects and Contacts databases, you can also merge two specific records together by using the "Select Multiple Rows" link at the top of the list, checking off two records to merge, and then selecting the "Merge Duplicate Contacts" menu item from the "Do Multiple" menu.

When two records are merged, the oldest record is considered more important and is retained. The newer record is compared against the older record and information from that newer record is added to the older record. For contacts and prospects that information would include phone numbers, email addresses, and the quick note. The newer record is then deleted as the older record now contains the information from both records. The Mail, Tasks, Notes & Files tabs are not merged, instead information from these tabs is retained from the older record only. If you need to recover the record that was deleted, you can do that by going to Main:Settings:Undelete.

Google Drive

Most agents will store a few files with each Closing, such as the ratified sales contact and the listing agreement. For that, you can use the "Notes & Files" tab located inside of the Prospect, Buyer, Listing and Closing records. Video Tutorial 37 has an explanation of how that capability works.

If your needs are greater, you can use Google Drive.


1. Create a Folder in Google Drive for each Closing. Name the folder anything you like - for example the address of the closing.
2. Go to the General tab of your Closing and copy and paste the Google Drive URL into the field at

Google Drive Folder ↕

PASTE URL HERE



the bottom named "Google Drive Folder". If you are unsure how to get that URL, just go to your Google Drive, click so that you are looking at the folder you want and copy the web address at the top of your internet browser. That URL is the link you want.

3. You can access that folder at any time by clicking on the box with the arrow pointing out of it which is located to the right of the URL. Additionally, your service report will also contain your Google Drive folder. 
4. Finally, the "Notes & Files" tab will also contain a link to your Google Drive folder. Click on any of those links to go directly to the Google Drive folder for that particular deal.

 [Configure Google Drive Folder](#)

DropBox

Most agents will store a few files with each Closing, such as the ratified sales contact and the listing agreement. For that, you can use the Notes & Files tab the is located inside of the Prospect, Buyer, Listing and Closing records. Video Tutorial 37 has an explanation of how that capability works.

If your needs are greater, you can use DropBox.


1. Create a Folder in Dropbox.com for each Closing. Name the folder anything you like - for example the address of the closing. Navigate to the folder in DropBox.com. Click on the little Paperclip icon at the top of the screen that has the label "Share Link". Click on the "Get Link" button. This will copy a link to sharing folder into your Clipboard.
2. Go to the General tab of your Closing and copy and paste the DropBox URL into the field at the

Google Drive Folder ↕

PASTE URL HERE



bottom named "Google Drive Folder". You can change the drop-down from "Google Drive Folder" to "DropBox Folder".


3. You can access that folder at any time by clicking on the box with the arrow pointing out of it which is located to the right of the URL. Additionally, your service report will also contain your DropBox folder. 
4. Finally, the "Notes & Files" tab will also contain a link to your DropBox folder. Click on any of those links to go directly to the DropBox folder for that particular deal.

 [Configure DropBox Folder](#)

Microsoft OneDrive

Most agents will store a few files with each Closing, such as the ratified sales contact and the listing agreement. For that, you can use the Notes & Files tab the is located inside of the Prospect, Buyer, Listing and Closing records. Video Tutorial 37 has an explanation of how that capability works.

If your needs are greater, you can use Microsoft OneDrive.


1. Create a Folder in Microsoft OneDrive for your Closing. Name the folder anything you like - for example the address of the closing. Navigate to that folder in OneDrive and then click on the Details icon in the upper-right corner of the screen, right below your name. That will display the Details Pane. Click on the "Share Folder" link. Click "Get A Link". Copy that link to your Clipboard. 
2. Go to the General tab of your Closing and copy and paste the Microsoft OneDrive URL into the

Google Drive Folder

PASTE URL HERE



field at the bottom named "Google Drive Folder". Change that drop-down to "Microsoft OneDrive" to represent that you are using Microsoft OneDrive.

3. You can access that folder at any time by clicking on the box with the arrow pointing out of it which is located to the right of the URL. Additionally, your service report will also contain your Microsoft OneDrive folder. 
4. Finally, the "Notes & Files" tab will also contain a link to your Microsoft OneDrive folder. Click on any of those links to go directly to the Microsoft OneDrive folder for that particular deal.

 [Configure SkyDrive Folder](#)