

LetterWriter Letters for RealtyJuggler Real Estate Software

Purchase Beson LetterWriter Letters

Purchase one (or all) of the Beson LetterWriter packages by going to this web address:

<http://davebeson.com/realtyjuggler/>

After purchase, you will receive two emails. The first is a receipt and the second is a download link. Be patient - the download link email may take a few hours to arrive.

Download Your LetterWriter Package

After receiving your email with the Download link, click on the link and save the file to your hard drive in a location you can find later. The file will be a .zip file. Open that .zip file. Inside you will find these instructions, and one or more .csv files which contain the actual letters in a format suitable for loading into RealtyJuggler.

There are 4 LetterWriter sets that can loaded:

- RJ_LetterWriter.csv
- RJ_eLetterWriter.csv
- RJ_LetterWriterPlus.csv
- RJ_LetterWriterPlatinum.csv

Loading LetterWriter Letters into RealtyJuggler

1. Sign into RealtyJuggler and go to **Main:Settings:Import**
2. Select from the Import menu item "Mail Form" and then click on "Choose File" button and select the.csv file you want to load. All of the other settings can be left as-is.
3. Click on the "Import" button.

Import: Mail Form

Format: Comma Separated Values (.csv)

Duplicate records: Not imported

Select a file: Choose File No file chosen

Import

Reviewing Loaded Letters

To review the letters that have been loaded into RealtyJuggler, go to **Main:Mail:Mail Forms**. You will see the letters that have been loaded on this screen.

- If there are more than 100 letters in your custom library, you will see a drop-down menu "Page:" in the upper-left corner of the screen. Select "All" to see all of the letters in your library, and not just the first 100.
- To see just the letters that are part of a specific DRIP letter sequence, select from the "Show Drip Group" menu item from the upper-right corner of the screen.

Show Drip Group: LetterWriter - FSBO (8) %

Done New Mail Form New DRIP Mail Form New DRIP Task

↵ Select multiple rows

Type	Description	Drip Group	Send Day▲
DRIP Letter	Congratulations!	LetterWriter - FSBO	0 Days After Start Date
DRIP Letter	May I help you?	LetterWriter - FSBO	7 Days After Start Date
DRIP Letter	Hiring a professional	LetterWriter - FSBO	14 Days After Start Date
DRIP Letter	The first 3 weeks	LetterWriter - FSBO	21 Days After Start Date
DRIP Letter	The first 4 weeks	LetterWriter - FSBO	28 Days After Start Date
DRIP Letter	Sold!	LetterWriter - FSBO	35 Days After Start Date
DRIP Letter	I can sell real estate	LetterWriter - FSBO	42 Days After Start Date
DRIP Task	DRIP Mail Complete: LetterWriter - FSBO	LetterWriter - FSBO	43 Days After Start Date

Leave Drip Group empty to create an individual (Non Drip) Custom Mail Form. For a Drip sequence, create multiple Mail Forms with the same Drip Group.

Select from drop-down menu to override a DRIP sequence from the Standard Letter Library: -- Drip Group -- .

[Import](#) [Export](#) [YouTube Tutorial 16](#) [YouTube Tutorial 17](#) [Mail Manual](#)

- Click on an individual letter to edit it.
- Letters that are not part of any DRIP sequence will be displayed under "Unfiled".
- You can sort on any column by clicking on the column title. For example, to view DRIP letters in sequence, click on the "Send Day" column.

If there are more than 100 letters in your library, you will see a message in red and bold at the bottom of the screen like this:

⚠ To view additional records, use 'Page:' drop-down menu in upper-left corner of screen.

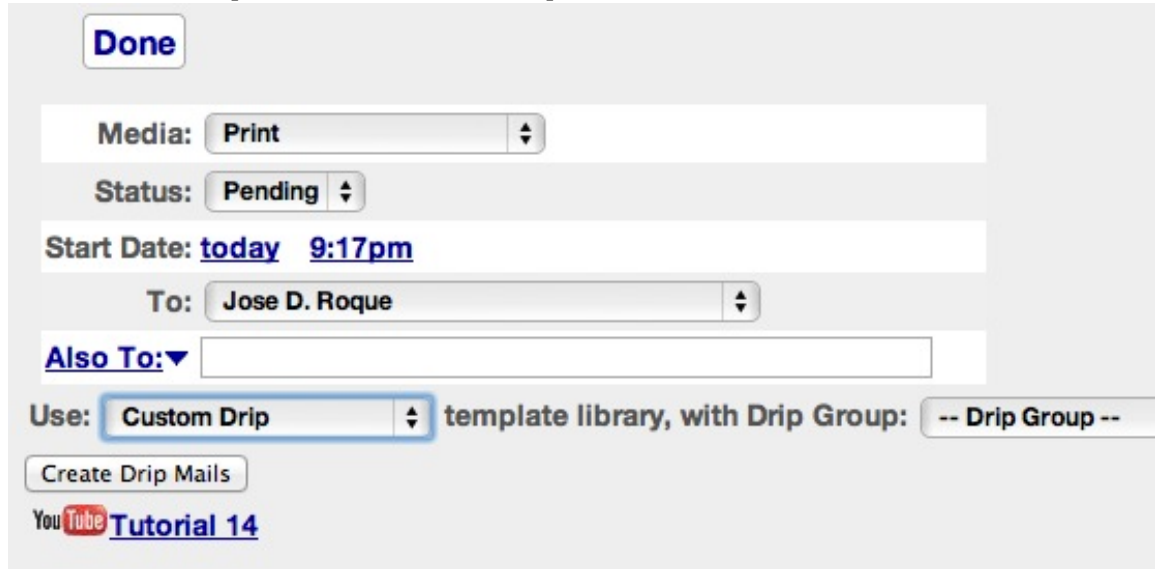


If you would like to see more than just the first 100 records, click on the "Page:" drop-down menu in the upper-left part of the screen and select the menu item "All"

Applying a DRIP Sequence

Applying a DRIP sequence to a Contact or Deal record is done as follows:

1. Go into the detailed view for the Contact or deal record that you want to apply the DRIP letter sequence to.
2. Click on the Mail tab on the left.
3. Click "New Drip Mail" button at the top of the screen.



The screenshot shows a form for creating a drip mail. At the top left is a "Done" button. Below it are several fields: "Media:" with a dropdown set to "Print"; "Status:" with a dropdown set to "Pending"; "Start Date:" with a date and time set to "today 9:17pm"; "To:" with a dropdown set to "Jose D. Roque"; and "Also To:" with an empty dropdown. Below these is a "Use:" dropdown set to "Custom Drip" and a "Drip Group:" dropdown set to "-- Drip Group --". At the bottom left is a "Create Drip Mails" button. At the bottom center is a "YouTube Tutorial 14" link.

4. Select "Media: drop down to determine if the letter will be sent as an email or printed letter. Leave Status as Pending and Start Date as today. Select from "To:" Drop-down who the letter is to.
5. **Change the "Use: Standard" drop-down to "Custom DRIP".**
6. From "Drip Group" drop-down select DRIP Group you wish to use and click on the "Create Drip Mails" button. Click OK for the confirm dialog.
7. You can now review the created letters. Click on a row to edit the letter.

Video Tutorial 14 has additional information on applying a DRIP sequence in RealtyJuggler. To view the video tutorials view RealtyJuggler's YouTube channel located here:

<http://www.youtube.com/RealtyJuggler>

Holiday Letters

Some of the Dave Beson letters are holiday letters for specific dates or months of the year. These letters are not part of any DRIP sequence. Instead, they can be applied to a category of Contacts or Prospects using the Mass Email or Mass printed options that are described below.

Sending a Mass Email Letter

If you wish to use a single LetterWriter letter as a Mass Email, follow the below instructions:

1. Go to **Main:Mail:Bulk Email**.

The screenshot shows a web interface for sending a mass email. At the top, there are two buttons: "Done" and "View Mail Queue". Below them is a "Start Date" field set to "today 11:26pm". The "Send Emails to:" field is a dropdown menu currently showing "-- Select Mailing To --". The "Use:" field is set to "Custom" and is followed by the text "template library, with" and another dropdown menu showing "-- Custom Template". A red instruction line reads: "Select from drop-down "-- Select Mailing To --" and then select a cat". At the bottom of the form are two buttons: "Create Email Batch" and "Get Sample Email".

2. Set Start Date to when you want to send your email.
3. Select the menu item "Select Mailing To" to specify what list you want to use, for example Contacts.
4. In the upper-right corner of the screen, select from the "Show Category" drop-down menu the category you want to use. Each contact with that category will be sent the email. You MUST assign a category to your contacts before doing a Bulk Email. Look at video tutorial 41 to see how to assign a category to your contacts.
5. **Change the "Use: Standard" drop-down to "Custom" and select the specific LetterWriter letter from the "Custom Template" menu.**
6. Click "Get Sample Email" to view a sample of the email that will be sent.
7. Click "Create Email Batch" to queue up the emails for sending.

Sending a Mass Printed Letter

If you wish to use a single LetterWriter letter as a Mass Printed letter, follow the below instructions:

1. Go to **Main:Mail:Mass Print**.

Print Letters for: -- Select Mailing To --

Missing Address: Skip Records with No Mailing Address

Sort Order for Letters: Alphabetical By Last Name

Progress Note: No Note

Download a batch of printable form letters.

Use a message from: Standard template library

and then select an individual template to use: -- Library Template --

[Download Letters](#)

Tutorial 13

2. Select the menu item "Select Mailing To" to specify what list you want to use, for example Contacts.
3. In the upper-right corner of the screen, select from the "Show Category" drop-down menu the category you want to use.
4. **Change the "Use: Standard" drop-down to "Custom" and select the specific LetterWriter letter from the "Custom Template" menu.**
5. Click "Download Letters" to print download your letters in a format suitable for viewing and printing in Microsoft Word.

Video Tutorial 13 shows how to print a mass printed letter.

Letterhead

You can install a graphical letterhead suitable for email and printed letters. This letterhead can contain company logo and contact information. Once installed, it will be automatically applied to all printed letters and emails automatically. Go to **Main:Mail:Letterhead** for information on how to get that installed.



Printing DRIP Printed Letters

You will need to periodically go to the **Main:Mail:Print Pending Mail** screen in RealtyJuggler to view your letters that need to be printed. Click on the link at the bottom of the screen to print all letters that have accumulated since you last printed letters. You will download a single document that can be viewed and printed from within Microsoft Word. You can also queue up labels (or envelopes) to be printed later. We call that your labels queue.



Printing Your Label/Envelope Queue

To print labels that have queued up go to **Main:Mail:Labels & Envelopes**. From the "Print Labels For:" drop-down select "Items in your Label Queue". Video tutorial 11

Print Labels for:

Missing Address:

Sort Order for Labels:

Name on Label:

Copy and paste addresses listed above for use with [DYMO LabelWriter](#) label printers.

Paper:

Click on the **Download** button below to download the addresses in rtf format. The resulting file can be opened and printed using Microsoft Word.

will show to to complete this process. You can select Avery envelopes or #10 envelopes from the Paper: drop-down menu on this screen.

Video Tutorial 11 shows how to print labels.

Mail Preferences

There are a number of mail preferences available in RealtyJuggler. They can be controlled by going to **Main:Settings:Preferences** and clicking on the Mail tab at the top of the screen. From there, you can control the default font (and size) used for both emails and printed letters. You can also control how your printed letters look - with dates, return address and to address. You can also control you signature, which is the text that is placed at the bottom of each of your letters.

General	Contacts	Calendar	Mail	Calculator	Commission	
Seller Net	Tasks	Expenses	Sellers	Rentals	Homes	Prospects
Bcc Me All Emails I Send: <input type="checkbox"/>						
Track if Email was Read: <input checked="" type="checkbox"/>						
Return Address: for Envelopes Only						
For Printed Letters, Add: 3 Lines after Text Letterhead						
Date: Include in printed letters						
For Printed Letters, Add: 3 Lines after Date						
Recipient Address: Include in printed letters						
For Printed Letters, Add: 3 Lines after Recipient Address						
Printed Header: 5 Blank Lines (NO Graphic)						
Printed Footer: 5 Blank Lines (NO Graphic)						
Printed Labels/Envelopes Font: Default						
Printed Labels/Envelopes Font Size: Default						
Printed Letters Default Font: Times New Roman						
Printed Letters Default Font Size: 14 Points						
Email Default Font: Default						
Summarize Sent Mail: After 3 Months						

Contact Information & Web Site

Make sure that you have entered accurate contact information into the Account link in the upper-right corner of the RealtyJuggler screen. Sign into RealtyJuggler and click on the Account link in the upper-right corner of the screen. **The Web Site information is particularly important as it is used in many letters.** Make sure that your web site is listed on this screen and that it includes the full web address, including the http:// part, for example:

<http://www.realtyjuggler.com>