

RealtyJuggler + LetterWriter Integration Guide



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RealOrganized™, Inc.

Organizational Software for Real Estate

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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

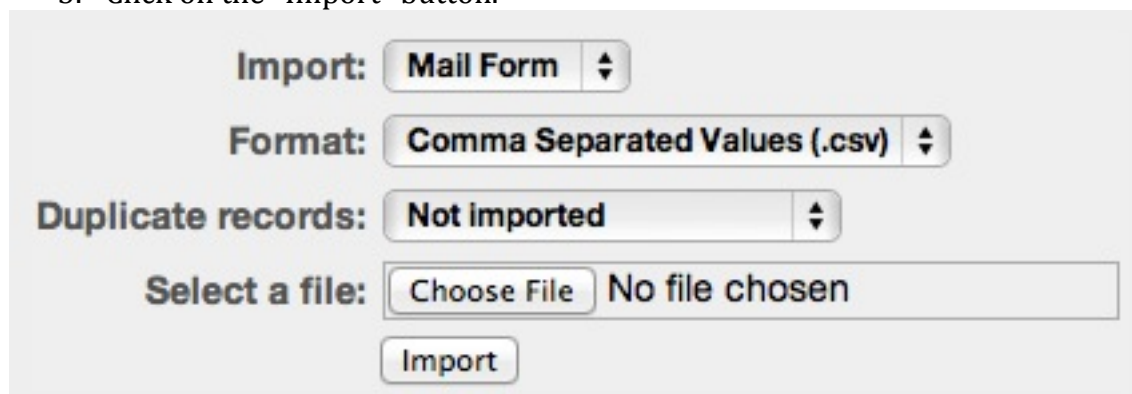
After receiving your email with the Download link, click on the link and save the file to your hard drive in a location you can find later. The file will be a .zip file. Open that .zip file. Inside you will find these instructions, and one or more .csv files which contain the actual letters in a format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

There are 5 LetterWriter sets that can loaded:

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



The screenshot shows the 'Import' settings in RealtyJuggler. It features four rows of settings, each with a label and a dropdown menu:

- Import:** Mail Form
- Format:** Comma Separated Values (.csv)
- Duplicate records:** Not imported
- Select a file:** Choose File No file chosen

Below the 'Select a file' row is an 'Import' button.

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: %

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: .

[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.

A screenshot of the 'New Drip Mail' form in the RealtyJuggler application. The form is set against a light gray background. At the top left is a 'Done' button. Below it are several fields: 'Media:' with a dropdown menu set to 'Print'; 'Status:' with a dropdown menu set to 'Pending'; 'Start Date:' with the text 'today 9:17pm'; 'To:' with a dropdown menu set to 'Jose D. Roque'; and 'Also To:' with an empty text input field. Below these fields is a 'Use:' dropdown menu set to 'Custom Drip' and a 'template library, with Drip Group:' dropdown menu 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>

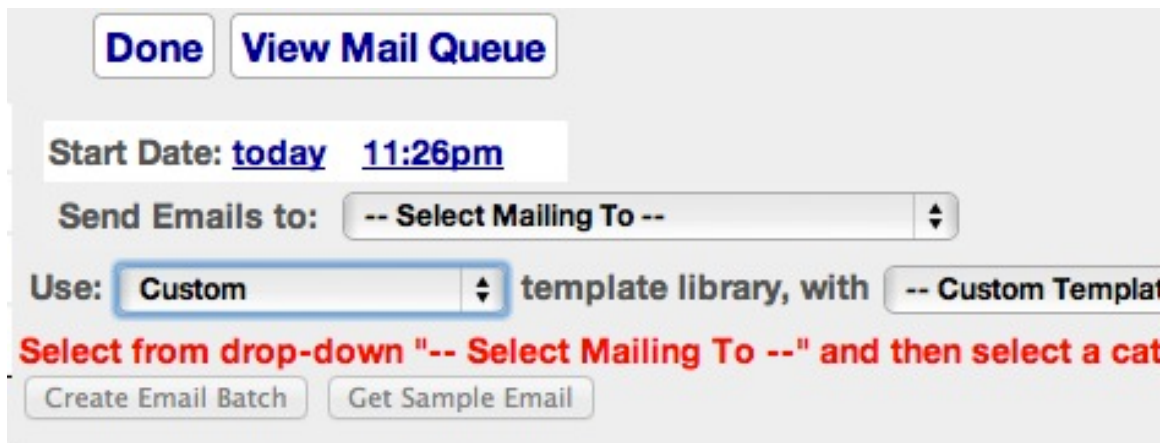
Holiday Letters

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**.



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.

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.



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 your signature, which is the text that is placed at the bottom of each of your letters.

Your Contact Information

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 Contact information is important, as it is mail-merged into some letters.**