



# RealtyJuggler Mail Tutorial



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Organizational Software for Real Estate

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# Table of Contents

|   |    |
|---|----|
| Introduction.....   | 5  |
| Video Tutorials .....   | 5  |
| How to Send a Letter.....   | 6  |
| How to Send a Drip Letter Sequence .....                            | 8  |
| Mixing Tasks and Drip Letter Sequences .....                        | 9  |
| Activity Plans.....   | 9  |
| Getting Notification that a Drip Letter Sequence has Completed..... | 9  |
| How to Send an eCard.....   | 10 |
| Letter/ Email Preferences.....                                      | 10 |
| Main:Settings:Preferences:Mail .....                                | 11 |
| Embedding Images in your Letters.....                               | 13 |
| Embedding a File Attachment into your Letters.....                  | 13 |
| Embedding an External Link into your Letters .....                  | 13 |
| Adding a Page Break to your Letters.....                            | 13 |
| Styling Text in a Letter.....                                       | 14 |
| Printed Letters and Emails.....                                     | 14 |
| Creating your Own Mail Form .....                                   | 14 |
| Spell Checking Your Mail Form .....                                 | 15 |
| How to Create a Custom Drip Sequence.....                           | 16 |
| How to Override/Duplicate a Drip Sequence .....                     | 17 |
| Making sure you Don't Send Same Drip Sequence Twice .....           | 18 |
| How to Rebuild a Drip Sequence .....                                | 18 |
| Shifting a Late Drip Sequence Forward in Time .....                 | 18 |
| Using Variables in Letters .....                                    | 19 |
| Salutation - Spouse with a Different Last Name.....                 | 19 |
| Salutation - Non-English Gender Endearment.....                     | 20 |
| Automatically Including a Photo of your Listing in a Letter.....    | 20 |
| Email and Unsubscribe.....  | 21 |
| Email Opt-Out List.....   | 22 |
| Getting Past SPAM Filters .....                                     | 22 |
| Sending Printed Letters to Many People .....                        | 24 |
| Sending Mass Email - Bulk Email.....                                | 25 |
| Sending eNewsletters and eFlyers with MailChimp .....               | 25 |
| Working with Multiple Categories .....                              | 26 |
| Sending Mass Email using Google Contact Groups.....                 | 26 |
| Exporting an Email/Printed Mailing List .....                       | 26 |
| Printing A Letter .....   | 28 |
| The Format of a Printed Letter.....                                 | 28 |
| Printing and Tasks.....   | 30 |

|  |    |
|--|----|
| Printing and Viewing ALL Pending Mail .....                    | 30 |
| Printing A Single Mailing Label or Envelope .....              | 31 |
| Printing Many Mailing Labels or Envelopes.....                 | 32 |
| Printing Directly on Envelopes .....                           | 33 |
| Printing Return Address Labels for Yourself.....               | 33 |
| Printing Addresses Directly on Postcards.....                  | 34 |
| Spanish Versions of Letters.....                               | 34 |
| Graphic Headers and Footers/Letterhead .....                   | 34 |
| Tracking if an Email has been Read/Opened.....                 | 36 |
| Showing Feedback.....  | 37 |
| Sending an Email to ALL Showing Agents .....                   | 37 |
| Custom Showing Feedback Letters.....                           | 38 |
| Programming the @ Icon to Launch your Email program .....      | 39 |
| For Google Chrome + Gmail Users.....                           | 39 |
| For Firefox Browser Users.....                                 | 39 |
| Telling Mac Mail what your Default Email Program Is.....       | 39 |
| For Windows 10 .....   | 40 |
| Microsoft Word .....   | 40 |
| Using Adobe Reader instead of Microsoft Word.....              | 40 |
| Making Microsoft Word the Default for .rtf Files.....          | 40 |
| Microsoft Windows Instructions.....                            | 41 |
| Macintosh Instructions .....                                   | 42 |
| Converting a .PDF or .DOC to an Embedded Image for Email ..... | 43 |
| Converting a Microsoft Publisher Document for Email .....      | 43 |
| Embedding Videos into an Email .....                           | 43 |

## **Introduction**

This document describes how send mail using RealtyJuggler. By mail we mean printed letters, address labels, envelopes, email, drip mail, bulk email, and anything else that you might need to do to communicate with your client or prospect. Everything is organized in easy-to-use tutorial form. Select what you want from the table of contents and go directly to the page you need.

RealtyJuggler also comes with hundreds of letter templates that you can use in your marketing activities. The full text of the RealtyJuggler letter library is available for your review in a separate document.

## **Video Tutorials**

RealtyJuggler comes with video tutorials that provide specific walkthroughs for the most common things that you will want to do. To access these videos, click on the Tutorials icon from the Main screen of RealtyJuggler.

## How to Send a Letter

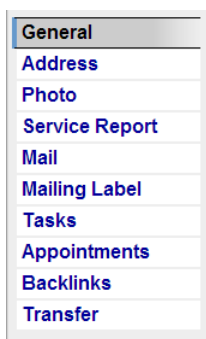
You can send a printed letter or Email to anyone you have a mailing address or email address for. Let's send a letter.

1. Sign into RealtyJuggler and click on the "Contacts" icon.
2. Click on the "New Contact" button at the top of the screen.
3. Enter your name (you can also enter a spouse name as well) in the first two fields and enter your email address into the email address field.

A form with two input fields. The first field is labeled 'Email' and has a dropdown arrow on the left. The second field is labeled 'Mobile Phone' and has a dropdown arrow on the left and a plus sign on the right.

You will notice that a new blank phone number/email address field was automatically created right below the email address

field when you started typing. You can enter up to 9 phone numbers and email addresses for each contact. A blank field will always be available for you. If you type in an email address into any of these fields, the @ character will automatically trigger the field being set to email.



4. To the left of the screen, you will see several tabs. You are now in the "General" tab. Click on the "Address" tab. Fill in your mailing address into the Home Address fields. Leave country blank unless the mailing address is out-of-country. If you would like to override the default letter salutation and mailing label salutation, you can do that here as well.
5. Click on the "Mail" tab to the left of the screen. You will now see a list of all the letters that have been sent or are pending. This list will be blank.
6. Click on the "New Mail" button at the top of the screen. You can decide if you want to send a printed letter or Email by selecting from the "Media:" drop-

down menu. The status should be set to "Pending". The letter, by default, will be sent 2 hours from the time you create it. You can override this date by clicking on the blue "today" link or override the time by clicking on the time link. The

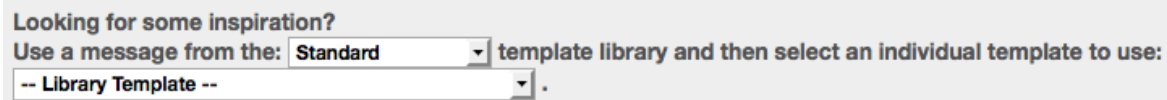
A form for configuring a new mail item. It has several fields: 'Media:' with a dropdown menu set to 'Email'; 'Status:' with a dropdown menu set to 'Pending'; 'Fixed Send Date:' with a dropdown menu and the text 'today 10:30am'; 'To:' with a dropdown menu and a blue double arrow icon; 'Also To:' with a dropdown menu and an empty text box; and 'Mail Subject:' with an empty text box.

screenshot below shows the time of 10:30AM. Letters can be sent based on specific dates, for example, 3 days before closing, or 5 days after Acceptance Date by clicking on the "Fixed Send Date:" drop down. If you would like to work on the letter, but not send it, you can set the status to "Draft".

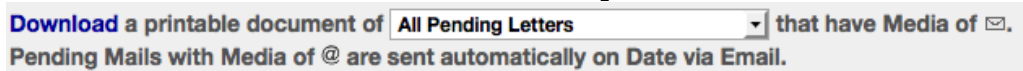
7. Click on the "To:", drop-down menu and select to whom you are sending the letter (to yourself, in this case). You will see a name, and if an email address is available, that will be listed in parentheses. Like this: Jack Adams ([Jack@aol.com](mailto:Jack@aol.com)). *The email address will be listed, even if you are sending the letter as a printed letter. Do not worry, if you print a letter, the physical address will be*

*used not the email address.* To send the email to multiple email addresses, you can use the "BCC To:" field.

- Below the large body field are two drop-down menus. These menus allow you to access the letter library. Click on the "Standard" drop-down menu. You will see three choices: Standard, Standard Spanish and Custom. The "Standard" template library contains around 80 letters that you can use. The "Standard Spanish" choice will allow you to select from those same letters in Spanish. The "Custom" choice will allow you to select from your own custom templates. Let's leave this drop-down selected as "Standard". Click on the second drop-down "—Library Template—". You will see the full list of all letters you can select in the drop-down. Pick one of the letters. This will fill in the mail subject and mail body with the template information.



- Click on the "Done" button at the top of the screen. Your letter will now be in the list of letters, and you will see that the Status is set to "Pending". If you set the "Media:" to "Email", the email will automatically be sent using our servers, with your email address in the "From" section.
- For printed letters, there is one more step. At the bottom of the list, you will see a "Download" link. Click on this link to download all pending letters with a media of Print. This downloaded file will be in RTF format that Microsoft Word can open.



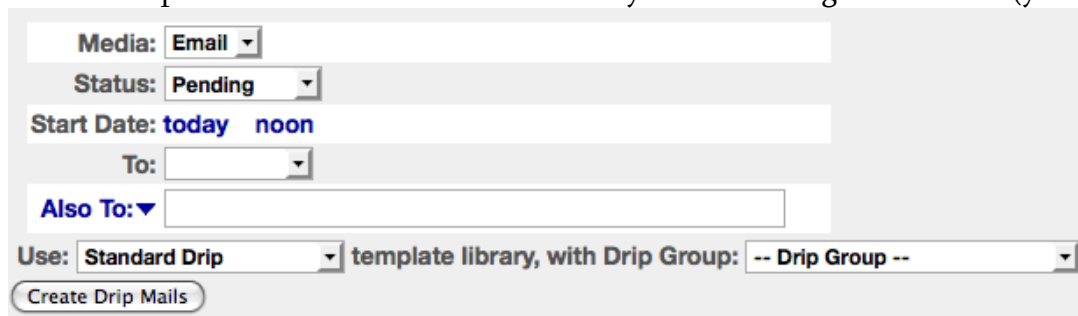
These instructions describe how to send a letter using a Contact record. These same steps can be followed to generate a letter for a Prospect, Buyer, Listing, Closing, or Rental record as well.

When you transfer a record from one section to another, any pending letters will be deleted. For example, if you have someone in your Prospects' database who has decided to use you as the listing agent for their home, you will go to that Prospect record, click on the "Transfer" tab, and transfer that Prospect to the Listing database. All pertinent information will be transferred from the Prospect to a Listing record and all pending letters will be deleted. This is a safety mechanism, so that you stop your prospecting activities once someone becomes a client.

## How to Send a Drip Letter Sequence

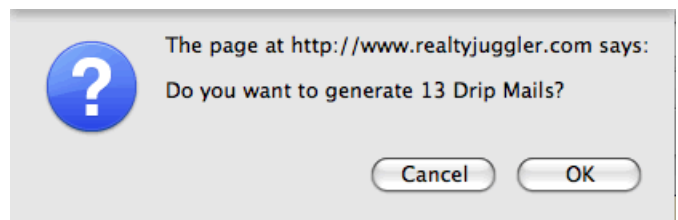
A drip Letter Sequence is a series of letters queued to go out over time. Below are the steps to do that:

1. Follow steps 1-5 for how to send an individual letter. Create your contact record and click on the Mail tab.
2. Click on the "New Drip Mail" button at the top of the screen.
3. You can decide if you want to send a printed letter or Email by selecting from the "Media:" drop-down menu. The status should be set to "Pending". There is also a media of "Interleave", which will designate 1/2 of the letters as emails and the other half as printed letters.
4. If you would like to work on the letter, but not send it, you can set the status to "Draft". Normally, you would leave the status as "Pending" which means that it is all set up and ready to go out.
5. Emails, by default, will be sent 2 hours from the time you create it. You can override this date by clicking on the blue "today" link or override the time by clicking on the time. The screenshot below shows the time of 10:30AM. Letters can be sent based on specific dates, for example, 3 days before closing, or 5 days after Acceptance Date by clicking on the "Fixed Send Date:" drop down.
6. Click on the "To:" drop-down menu and select to whom you are sending the letter to (yourself, in




this case).

7. The "Standard Drip" and "—DripGroup—" drop-down menus allow you to access the letter library. Click on the "Standard Drip" drop-down menu. You will see three choices: Standard Drip, Standard Drip Spanish and Custom. The "Standard" template library contains around 15 letter sequences that you can use. The "Standard Drip Spanish" choice will allow you to select from those same templates in Spanish. *The "Custom" choice will allow you to select from your own custom templates.* Let's leave this drop-down selected as "Standard Drip". Click on the second drop-down "—Drip Group—" to see the full list of the Drip sequences. Pick one of the sequences.
8. Click on the "Create Drip Mails" button. An alert will now ask you to confirm that you want to generate multiple letters. Click "OK".
9. Your letters will now be in the list of letters, and you will see that the Status is "Pending". If you set the Media to "Email", the email will automatically be sent using our servers at the designated date and time, with your email address in the From field.
10. For printed letters, there is one more step. At the bottom of the list, you will see a "Download" link. Click on this link to download all pending letters with a media of Print. This downloaded file will





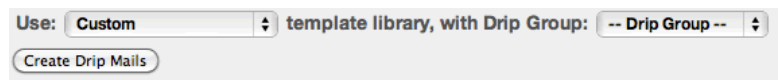
be in RTF format, which can be opened with Microsoft Word.

[Download a printable document of All Pending Letters](#) that have Media of . Pending Mails with Media of @ are sent automatically on Date via Email.

Drip sequences can be a handy way to automate your workflow. This example shows how to generate a Drip sequence for a Contact record. You can do the same thing for a Prospect, Buyer, Listing, Closing or Rental record. When you transfer a record from one section to another, for example, if you Transfer a Buyer record to Closing, all pending letters will be deleted. This is to make sure that your marketing is fresh and topical based upon the status of your client or prospect.

If you would like to apply your own custom drip sequence:

1. Create your own custom drip sequence by following the instructions in the *How to Create a Custom Drip Sequence* section of this user's manual.
2. Instead of selecting "Standard" from the template library drop-down. Select "Custom". You will see your custom sequence drip group in the -- Drip Group -- drop-down. Select the drip group you want and click on the "Create Drip Mails" button.



## Mixing Tasks and Drip Letter Sequences

### Activity Plans

Sometimes you would like to make your drip letter sequence part of a larger plan. Perhaps you want to include postcards, phone calls, appointments, and other means of communications in a total package. The easiest way to do this is to go **Main:Mail:Mail Forms** and add tasks to your letter sequence by clicking on the "New Drip Task" button at the top of the screen.

**Tip:** Make sure that you fill in the drip group.

### Getting Notification that a Drip Letter Sequence has Completed

RealtyJuggler can be configured to include a task reminder at the end of the drip library letters. This is controlled by a preference setting located at **Main:Settings:Preferences:Tasks**. If you change the "Task completion reminder for library drip sequences" drop-down to "Include" then all future library drip sequences applied will then include a task with a due date that matches the date of the last letter in the drip sequence. This is a handy way of keeping track of lengthy drip sequences and remembering to take a next step - perhaps making a follow-up call, for example.

## How to Send an eCard

RealtyJuggler features a rotating library of holiday-themed eCards as well as birthday cards, which are great for sending seasonal (and Birthday) email greeting to your clients and leads. The eCard library features animated email templates for holidays throughout the year, and is updated with new eCards each year, so there's no need to worry about sending the same card two years in a row. Sending an eCard works much like sending a standard email.

1. Sign into RealtyJuggler and click on the "Contacts" or "Prospects" icon.
2. Open the Contact or Prospect that you want to send the card to.
3. Click on the "Mail" tab on the left side of the record and then use the "New Mail" button to start a new email.
4. By default, the "Media" will be set to "Email" and the "Status" should say "Pending."
5. Set the date and time that you want to send your eCard.
6. Select the desired recipient from the "To:" drop-down.
7. Scroll to the bottom of the page, under the email body, and switch the "Standard" letter library to "eCards 2019."
8. Select the desired eCard name from the "Library Template" drop-down to the right. The eCard will be added to the body of your email above.

The eCards can also be sent as Bulk Email from the Main:Mail:Bulk Email page of the account. The Bulk Email page has the same drop-down menus as described in steps 7 and 8 above. Use those to select the desired eCard for your mass email blast. Refer to page 23 of this manual for more information on sending Bulk Email.

## Letter/ Email Preferences

RealtyJuggler sends your emails automatically, using our servers. The "From" field for these emails will reflect the email address you used when signing up for your RealtyJuggler account. If you need to change this email address, you can edit by clicking on the "Account" link in the upper-right corner of the screen. This is the same location where you can edit your name, mailing address and other contact information. This contact information is used by default in all correspondence from RealtyJuggler, so be sure to keep it current.

[Log Out](#) | [Account](#)

For instructions on installation of a graphic letterhead, click on the 'Install Letterhead' tab below.

[Email](#) | [Printed](#) | [Labels](#) | [Install Letterhead](#)

|  |                                 |
|--|---------------------------------|
| Printed Letters Default Font:                | Default                         |
| Printed Letters Default Font Size:           | Default                         |
| Top Margin:                                  | 1/2"                            |
| Printed Header:                              | Auto (Use Graphic if available) |
| Return Address:                              | Include                         |
| For Printed Letters, Add:                    | 1 Line after Return Address     |
| Date:  | Include in printed letters      |
| For Printed Letters, Add:                    | 1 Line after Date               |
| Recipient Address:                           | Include in printed letters      |
| For Printed Letters, Add:                    | 1 Line after Recipient Address  |
| Use Alternate Signature for Printed Letters: | <input type="checkbox"/>        |
| Printed Footer:                              | Auto (Use Graphic if available) |
| Bottom Margin:                               | 1/2"                            |
| Left Margin:                                 | 1"                              |
| Right Margin:                                | 1"                              |

[Edit signature & return address](#)

The settings to control your Printed letters are available in the **Main:Mail:Letterhead** section. From there, click on the "Printed" tab at the top of the screen. A number of settings are available for your letters.

The default font can be set as can the default font size. The printed header is typically installed as an image using the "Auto" option. However, you can add extra blank lines or suppress the installed

graphical header using the "Printed Header:" drop-down.

The "Return Address:" allows you to specify if you would like RealtyJuggler to print your return address. If you have pre-printed stationery, you will want to select "Do Not Include". Additionally, if you have opted to use a Graphical header and footer for your letters, you will also want to select "Do Not Include".

The "Date: " drop-down menu allows you to control whether the current date is included at the top of your printed letters. The default is to include it, as this is typical of business letters.

The "Recipient Address:" drop-down menu allows you to control whether the address of the person you are sending a printed letter to is included at the top of the letter. It is standard for printed letters to have this and therefore including it is the default.

"Use Alternative Signature for Printed Letters" allows you to use one signature for emails and a second for printed letters.

## **Main:Settings:Preferences:Mail**

The "Bcc Me All Emails I Send" allows you to receive a copy of any email you send using RealtyJuggler. This can be useful for keeping an archived record of your emails and for receiving notifications when a drip email is sent.

The "Track if Email was Read" option allows you to know if the person you've sent an email to has read it. Read Tracking uses a transparent image which, when displayed, notifies RealtyJuggler when the status of the email has changed from "Sent" to "Sent+Read". This technology is not 100% reliable. Some people will not display images when they read your email, resulting in an unchanged status. You cannot use both the "Track if Email was Read" and the "Bcc Me All Emails I Send" options together. Use one or the other, but not both.

The "Summarize Sent Mail" option allows you to have mail that you have sent truncated and archived over time. For example, after a set amount of time (3 months, for example) letters that have been sent will be trimmed so that the body of the letter is trimmed away. This is a handy setting if you are sending many letters and are finding that accessing your records has slowed down due to the large quantity of letters in your database. If you select this option, you will be able to see a summary of all letters that have been sent and archived by clicking on the yellow note icon from the Mail tab.



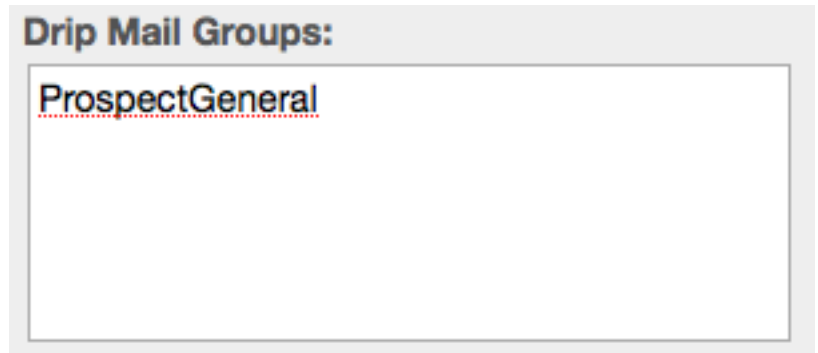
"When sending Email using @" option allows you to specify a default email body when you send emails by clicking on the @ icon to the right of any email address within RealtyJuggler.

The %MarketArea% text field in the preferences screen should be filled in with a list of the cities or areas that you service. For example, you might put in "Loudoun County" if that's the area of the country/state

that you work. We use that variable as a mail merge variable for the letters in RealtyJuggler. Many letters in RealtyJuggler describe the area that you serve. If you do not enter anything into this field, we will use the term "your area".

The %GlobalVariable1% and %GlobalVariable2% are two mail-merge variables that you can use for your own needs.

The list of drip mail groups is used when you create your own custom drip mail sequences. Each group represents a sequence of letters.



The %Signature% field is normally added at the end of all of your letters and emails. This contains your name, return address, email address, and phone number(s). RealtyJuggler will fill in reasonable default values for this based upon your Account settings. To override your default signature, simply edit this field.

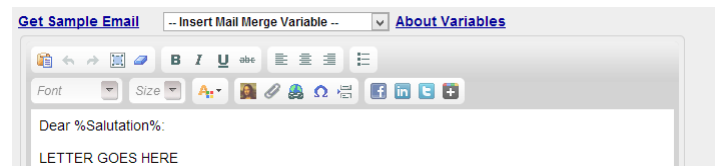
The Return Address field is used when printing letters as well as envelopes. You will want this address information to reflect your name and postal address.

## Embedding Images in your Letters

Embedding images into your letters is a 2-step process:

1. Go to **Main:All Files** and upload your image into RealtyJuggler. Check off the "Enable Web Link" checkbox.
2. Edit your Mail by going to **Main:Mail:Mail Forms**. You will see a ribbon of buttons at the top of the body field. Click on the icon that looks like a miniature Mona Lisa and select the file from the list that you just uploaded.

Once the image has been inserted into the body of your letter, you can adjust the size by double-clicking on it.



## Embedding a File Attachment into your Letters

Embedding a file attachment into your letters is a 2-step process:

1. Go to **Main:All Files** and upload your file into RealtyJuggler. Check off the "Enable Web Link" checkbox.
2. Edit your Mail for by going to **Main:Mail:Mail Forms**. You will see at the top of the body field a ribbon of buttons. Click on the icon that looks like a miniature paper clip and select the file from the list that you just uploaded. By default, the link text will be the exact same as the link URL. If you would prefer to specify your own link anchor text, then type it in first, select that text, and then click on the paper clip icon.



## Embedding an External Link into your Letters

Embedding an external link into your letters is a simple 2-step process.

1. Type the anchor text that you would like to use for your link. For example, 'Click Here to View Newsletter'.
2. Click on the link icon that has a world behind it and type in your link URL.



## Adding a Page Break to your Letters

To add a page break to your letters, click on the icon above the Body text field that looks like two pages with a blue arrow between the pages.

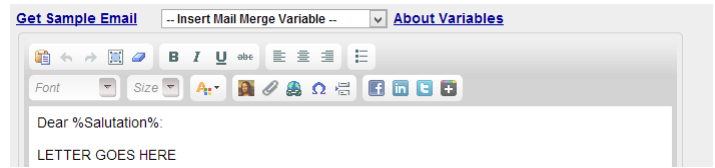


## Styling Text in a Letter

You can change the font, text color, font size and style (bold, italic, underline etc.) for text in your letters. This is controlled using the ribbon of buttons at the top of the Body text field.

You can also control the default font and font size used for letters, emails, and printed labels/envelopes.

This default setting is useful to set a policy of always using a specific font and font size for your printed letters and another for emails. These settings are available by going to **Main:Mail:Letterhead** and clicking on the "Mail" tab at the top of the screen.



## Printed Letters and Emails

Both Printed letters and Emails use the same letter templates. This means that you can use the same letter boilerplate for either purpose. When the letter or email is sent, it is formatted based upon the specific purpose. For example, for printed letters, the date and return address are added to the top of the letter. For emails, a subject is used and the "from" and "to" email addresses are used instead of postal addresses.

Emails will go out automatically at the date and time you specify. Once the email has been sent, its status will be changed to "Sent".

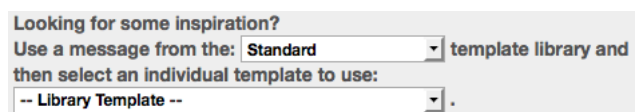
For printed letters, you will need to print these out using your own printer. You will find a link to do that at the bottom of the Mails list inside of every record (click on the "Mails" tab to the left when you are inside of any record). You can specify the letters to print, based upon due date. Therefore, if you wish to print only the letters that are due today, you can do that.

Additionally, you can view all pending letters for all of your records by going to **Main:Mail:View All Mail** section of RealtyJuggler.

## Creating your Own Mail Form

Below are instructions on how to create and use your own Mail forms.

1. Sign into RealtyJuggler and go to the **Main:Mail:Mail Forms** section.
2. Click on the "New Mail Form" button at the top of the screen.



3. A blank mail form will be displayed. Two drop-down menus are displayed below the large text field. The first menu is called "Standard" and the second is called "—Library Template —". Choose from the first drop-down menu to select which library you would like to draw upon. There are four choices – Standard, Standard Spanish, Standard Drip and Drip Spanish. For now, let's use the "Standard" library. The second drop-down allows you to select the specific message form from that library. Select any item from that second drop-down menu.

The screenshot shows a web form for creating a mail. At the top, there's a 'Type' dropdown menu set to 'DRIP Letter'. Below it is a 'Description' text field containing the word 'Template'. Underneath is a 'Drip Group' dropdown menu. Below that is a 'Drip Day' field with '0' and a 'Days' label. Further down are 'After' and 'Start Date' dropdown menus. At the bottom, there's an 'Email Subject' field with the text 'A quick note from %AgentFirstName% %AgentLastName%'.

4. Default values will now be displayed in the fields at the top of the form. You can edit any of these fields any way you wish. The fields are as follows:
  - a. **Description** – This is the name of the form that will be displayed in the drop-down menu when you deploy this form. Pick a name that makes sense to you. This text is not displayed to the recipient of your message.
  - b. **Drip Group** – Leave this blank. This is used for drip sequences.
  - c. **Drip Day** – This is also used for drip sequences. Leave this field blank as well.
  - d. **After Start Date** – Leave this alone as well. This is used for drip sequences.
  - e. **Subject** – This is the subject line for Email messages. This text is not used when sending printed letters.
  - f. **Large Field** (not displayed) – this is the body of your message.
5. You can use variables to do a mail merge. For example, %Signature% is replaced with your signature text when you use the form. The complete list of variables is available by clicking on the "Variables" link. You can use these variables from both the Subject and Body fields. The use of variables allows you to create a template and to re-use that template, while at the same time personalizing it based upon the name of the person you are sending the letter to, the address of the property, a special date or any of the more than a dozen variables that are available to you.
6. Click "Done" button at the top of the screen.

You have now created your own Mail Form. To use this form:

1. Go into any Contact, Prospect, Buyer Listing, Closing or rental record and click on the "Mails" tab to the left.
2. Click "New Mail" button at top of the screen. Look at the bottom of the screen for the two "Looking for Inspiration" drop-down menus. Select "Custom" from the first drop-down and select your form from the second. You will notice that the second drop-down menu displays the Title of your template.

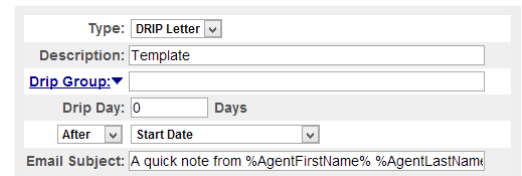
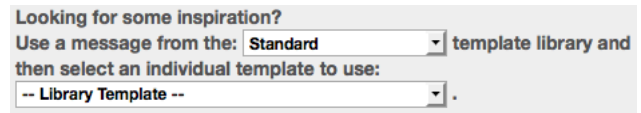
## Spell Checking Your Mail Form

All modern web browsers have spell checking built in. That includes Safari, Firefox, Microsoft Edge, and Google Chrome.

## How to Create a Custom Drip Sequence

Below are instructions on how to create and use your own drip mail sequence.

1. Sign into RealtyJuggler and go to the **Main:Mail:Mail Forms** section.
2. Click on the "New Mail Form" button at the top of the screen.
3. A blank mail form will be displayed. At the bottom of the screen below the large field are two drop down menus. The first menu is called "Standard" and the second is called "--Library Template --". Choose from the first drop-down menu to select which library you would like to access. There are four choices – Standard, Standard Spanish, Standard Drip, and Drip Spanish. Select the "Standard Drip" option.
4. The second drop-down allows you to select the specific message form from that library. You will see that the list is rather large with individual menu items grouped together. Select any one of these messages.
5. Default values will now be displayed in the fields at the top of the form. You can edit any of these fields any way you wish. The fields are as follows:
  - a. **Description** – This is the name of the form that will be displayed in the drop-down menu. Pick a name that makes sense to you. This text is not displayed to the recipient of your message.
  - b. **Drip Group** – Since you are building a drip sequence, you will want to name the sequence. Since you selected from one of the library templates, you will see a default drip group. You can change that group if you like.
  - c. **Drip Day** – This defines when you would like this Message to be sent. If you specified 0 or 1, this letter would go out immediately (on day 1). If you specified 7, this letter would go out 7 days from the time you applied the sequence.
  - d. **After Start Date** – For most purposes, you will want to have the drip sequence start when you deploy it and have the dates be based upon the "Start Date", which is the date that you deployed the sequence. If you like, you can get more sophisticated with your sequences. For example, you could have an email go out 3 days after "Acceptance Date" or 5 days before "Closing Date".
  - e. **Subject** – This is the subject line for Email messages. This text is not used when sending printed letters.
  - f. **Large Field** (not displayed) – this is the body of your message.
6. You can use variables to do a mail merge. For example, %Signature% gets replaced with your signature text when you use the form. The complete list of variables is available by clicking on the "Variables" link on the mail form. You can use these variables from both the Subject and Body fields.
7. Click "Done" button at the top of the screen.
8. You are now in the list of Mail Forms. You will want to repeat steps 2-6 and create a "New Form" for each individual message that you want to have in your drip sequence. Keep in mind that each of

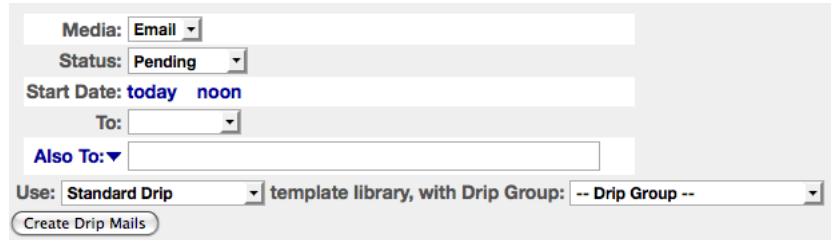
A screenshot of a form for creating a drip sequence. The form has several fields: "Type" (DRIP Letter), "Description" (Template), "Drip Group" (a dropdown menu), "Drip Day" (0) with "Days" next to it, "After" (a dropdown menu), "Start Date" (a date picker), and "Email Subject" (A quick note from %AgentFirstName% %AgentLastName%).



the individual drip messages must have the same Drip Group in order to be bundled together. All of the other fields can be anything you like, but that Drip Group is how you will be able to identify which messages belong to that drip sequence.

You have now created your own drip mail sequence. To use this custom drip sequence:

1. Go into any Contact, Prospect, Buyer, Listing, Closing, or Rental record and click on the "Mail" tab to the left.
2. Click "New Drip Mail" button at the top of the screen. From the "Standard Drip" drop-down menu, select the "Custom" option. You can then select your drip group from the "—Drip Group—" drop-down menu.
3. Click on the "Create Drip Mails" button.



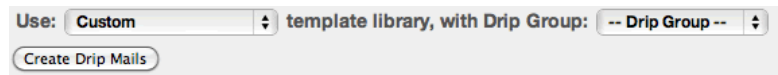
If you are working with a complex drip sequence, you may find it valuable to filter which Mail Forms are displayed in the **Main:Mail:Mail Forms** section. To filter based upon a specific Drip Group, select from the drop-down menu in the upper-right corner of the screen.

Keep in mind that a drip sequence consists of several mail messages with the same drip group. If you would like to take one of the drip sequences that come with RealtyJuggler and modify it, you will need to create a new mail form for each individual message in the sequence. For example, if you want to modify a sequence of 4 drip mail messages, you will need to create 4 Mail forms. For each of those mail forms, you can use any of the pre-defined mail messages as inspiration, but just make sure that the drip group is the same for all 4 of those messages.

**You can also include Tasks with your drip Letters. Just click on the "New Drip Task" button from the Main:Mail:Mail Forms section to associate a task with a drip letter sequence.**

## How to Override/Duplicate a Drip Sequence

RealtyJuggler comes with over 40 sequences that can be used as is. However, most people will feel the need to tweak these drip sequences. To do this, go to the **Main:Mail:Mail Forms** section of RealtyJuggler. At the bottom of that screen you will see two drop-down menus. The first menu allows you to pick the library where the original sequence is located. The second drop-down allows you to select the drip group name of the original drip group. Select from the first menu and then from the second menu. You will next be asked to name your new drip. Click OK. The new drip letters will then be added to



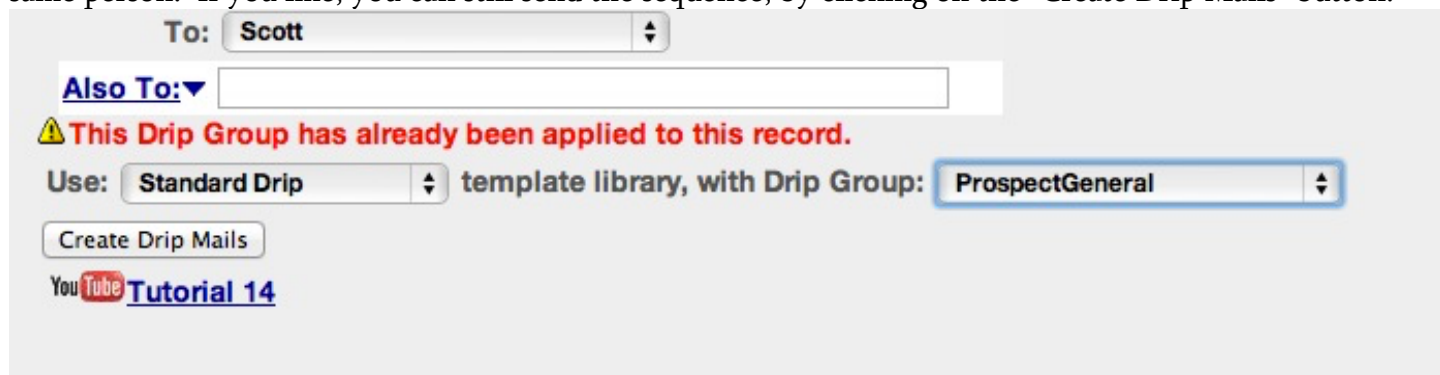
the Mail Forms list. You can click on these letters and modify (or delete or add) to them as you wish.

Video Tutorial 17 shows how this works. Video tutorials are available by going to **Main:Tutorials**.

When you are ready to use your custom drip sequence, follow the instructions in the section *How to Send a Drip Letter Sequence*. However, instead of selecting your drip sequence from the Standard Template Library, you would select the Drip sequence from the Custom Template Library.

## Making sure you Don't Send Same Drip Sequence Twice

RealtyJuggler maintains an archive of every email and drip sequence that has been applied to your Contacts and deal records. If you try to apply a drip sequence that has already been used, you will see a message in red warning you. This is a safety mechanism, so you can avoid sending a duplicate drip sequence to the same person. If you like, you can still send the sequence, by clicking on the "Create Drip Mails" button.



## How to Rebuild a Drip Sequence


When your drip sequence is applied the To: email address and your signature is automatically added. This means that if a client changes their email address, or if you change the contact information in your email signature, you may need to update drip letters and emails that have not yet been sent. To do this, go into the Contact or Deal record and click on the Mail tab on the left. Click the "New Drip Mail" button at the top of the screen and enter the information as if you will be applying the Drip sequence all over again. A message in red will describe how to rebuild just the unsent letters in the sequence.

**⚠ This Drip Group has already been applied to this record and there are 6 Pending letters left in the sequence. [Click Here](#) to rebuild these unsent letters with Body and To information while preserving the Send dates and Subject.**

## Shifting a Late Drip Sequence Forward in Time

Sometimes you may need to shift an applied drip sequence forward in time. If that happens, go to the deal, or contact record and click on the "Mail" tab on the left. If you have a late drip sequence, RealtyJuggler

will put up a message "in bold and in red asking if you want to shift that drip sequence forward. If you click on the link, the unprinted letters and uncompleted tasks in your drip sequence tasks will be shifted forward in time by the appropriate number of days such that you can start printing the first letter today.

 **The Drip Group ProspectGeneral is behind schedule by 6 days. [Click here to shift forward the send date for all unprinted letters and uncompleted tasks in this Drip Group.](#)**

## Using Variables in Letters

Letter templates can have variables embedded in them. These variables are filled in before you send your letter. They can include your signature line, at the end of the letter, the name of the person that the letter is addressed to, as well as a number of other variables. These variables can be used in either the subject or body of the template. The two most common variables are:

- **%Salutation%** - the combined first name and spouse first name of the person you are sending the Email to. It can be personalized by going to the Address section of the Contact record and modifying the Salutation field.
- **%Signature%** – goes at end of email and is your contact information.

The comprehensive list of all mail merge variables available is listed at this link:

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

## Salutation - Spouse with a Different Last Name

The %Salutation% variable is used in almost all of your letters and allows you to mail merge in the first name of the person you are sending the letter to. Therefore, you can send a letter like:

Dear John:

If you have filled in the Spouse field, the salutation will include the spouse as well. Like this:

Dear John and Sally:

RealtyJuggler tries to combine the first name and spouse name to create an appropriate greeting. To override this default value, go to your Contact record and click on the Address tab to the left. Now fill in

the Salutation field. The Label/Envelope To field located right below the Salutation field and allows you to customize the label name for printed labels and printed envelopes.

These fields are also useful for working with Doctors, Professors or other people who need to be addressed in special ways.

These two fields are available in the **Main:Contacts:Address** section of your contact database. They are also available for each of the parties in any of your deal records. For example, if you have a Prospect that you need to tweak the Salutation for, go to **Main:Prospects:Parties**. Click on the Prospect party and you can edit these two fields.

## Salutation - Non-English Gender Endearment

RealtyJuggler includes Spanish translations of the English letters. These letters use a gender neutral salutation of "Estimado %Salutation%:". If you prefer to have your letters use gender specific endearments, you can add that to the "Salutation" and "Letter To" fields located in the "Address" tab inside of a Contact record. The same fields are available within the "Party" tab of the Prospect and deal records. So, for your salutation, you can include the gender specific salutation within the Salutation itself. Then, adjust your letter so that the word "Estimando" is not included in the letter template - since the gender specific version is already included in the "Salutation" field.

## Automatically Including a Photo of your Listing in a Letter

If you would like to automatically include a photo of the home in a listing feedback request or any other letter, this is how to do it:

1. Include the mail merge variable %HomePhoto% into your Mail Form located at **Main:Mail:Mail Forms**.
2. Upload a photo of the home into the "Notes & Files" tab of the Listing record. Make sure to select the Mail Merge Variable %HomePhoto%, so RealtyJuggler will know which photo to include. When you upload the photo, we recommend selecting 300 pixels.
3. We recommend selecting: "Resize Image To: Maximum 300px Wide" when you load the photo. This will produce the most pleasing results.
4. Click on the "Mail" tab and apply the Mail Form that you've created. The image will automatically be added to your letter and is ready to be printed or emailed.

These same techniques can be used to embed a file attachment or multiple photos using the mail merge variables %Photo1%, %Photo2%, %Attachment1%, %Attachment2%.

## Email and Unsubscribe

All emails sent using RealtyJuggler have an unsubscribe link at the bottom of them. This link is legally required to comply with both US law (CAN-SPAM Act) and provisions of other country's

electronic communications laws such as Canada's Fighting Internet and Wireless Spam Act.

| Due/Done ▲   | Description  | Categories |
|--------------|--|------------|
| today        | Mail ERROR: BadEmailAddress for: Are you thinking of selling your house? | AutoTask   |
| today        | Print Letter: Thanks for Visiting  | AutoTask   |
| Nov 17, 2009 | Print Letter: We can save you Time House Hunting                         | AutoTask   |
| Nov 24, 2009 | Print Letter: Expert Knowledge of the Local Real-Estate Market           | AutoTask   |
| Dec 1, 2009  | Print Letter: Home Loan Pre-Approval                                     | AutoTask   |

If someone clicks on the unsubscribe link, the status of that email will be marked "OptOut" or "OptOutDrip" and that email address will be added to your Opt-Out list which is located at **Main:Mail:Email Opt-Out**.

The status of "Complaint" is set when the recipient of your email and complained by clicked on the "This is SPAM" button within their email reader. We are obligated to police these complaints. A high complaint rate will adversely affect your and our reputation and our ability to deliver emails without interference. The most common source of complaints is traced to sending emails to strangers or to someone you know but have not been in communication with for many months.

To clear a "Complaint" error from your Email Opt-Out list:

1. Contact the recipient of your email and have them look in their junk mail folder. If your email is there, have them click on the "This is NOT spam" button for all your emails. This helps "train" the spam filter that your messages are OK.
2. Have the recipient of your email add you to their Email address book. This "white lists" you and is the single most important thing you can do to make sure your emails never get marked as spam in the future.
3. Go to **Main:Mail:Email OptOut** and click on the "Reset" link next to the email address.

Another kind of Mail Status is the "HardBounce" error. This error indicates a problem with the email address that caused the email message to not be delivered. This is usually due to a typo in the email address or an email address that is no longer valid.

Emails that are "Pending" are ready to be sent at the designated date and time. Once they have been sent successfully, the status will change to "Sent". If you have requested tracking if the email has been read, the status will change to "Sent+Read" once someone has opened them.

A status of "SentByHand" indicates that you have taken responsibility for sending the email using your own email program. Review the section "Programming the @ Icon to Launch your Email program" of this manual for instructions as to how to configure your email program to work with RealtyJuggler. Sending emails by hand is NOT the typical way to send emails using RealtyJuggler. The normal way of using

RealtyJuggler is to queue up the email with a status of "Pending". Then, our servers will automatically send the email at the designated date and time.

## Email Opt-Out List



RealtyJuggler automatically tracks unsubscribe requests, mail bounces (invalid email addresses) and spam complaints. You can view the list of these status values by going to **Main:Mail:Email Opt-Out**. If you need to reset one of these values, you can do so. You can also add additional emails to your opt-out list by entering them from here as well. If you would like to export your opt-out list, to give to a newsletter provider, you can do that from here as well.

All emails you send using RealtyJuggler honor your Email Opt-Out list. If an email address is on this list, then any email queued up or sent using RealtyJuggler will be stopped before it is sent. Sending bulk email will automatically skip these Opt-Out email addresses. We do this to assure the highest deliverability of the emails you send using RealtyJuggler. Mail servers track these points of failure and penalize users who repeatedly send emails to invalid email addresses, addresses where the recipient has opted out, or complained. By using an Opt-Out list, you can be assured that when you send emails, they will be more likely to end up in someone's in Box instead of their Junk Mail folder.

## Getting Past SPAM Filters

Email is typically filtered for spam before it gets to the Inbox of the recipient. Spam Filters are trained to detect solicitations as well as emails from strangers and place them into the "Junk Mail" folder.

Listed below are a few steps that you can take to avoid having your sent emails marked as spam:

1. **The most important thing that you can do when building a relationship with a prospect is to have them add you to their addressbook.** If your contact information and email address are in the recipient's addressbook, your email should sail right through the spam filter.
2. **Many spam filters also look for back-and-forth e-mail communication between you and the recipient. This is considered a good sign and will lower any spam penalty on future correspondence.** For this reason, we highly recommend that you send your first email to a prospect by hand, and then request that your prospect reply to the email to verify that the email address is correct. **This back-and-forth will build the trust of the spam filter and allow future emails to go through without objection.**
3. The first email you send to a recipient is the most important one. If that first email is marked spam, then future emails will also probably be marked spam. Make sure that initial email is a squeaky clean email that will sail past the spam filters. Whenever possible, call the recipient and ask if they got your first email. If they say they did not, have them check the "Junk Email" folder and mark that email as not junk. Spam filters are "trainable" and actions on the part of the recipient can teach the spam filter that your emails are not spam.

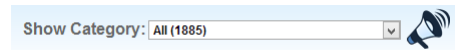
4. The specific content of your email is the also a determinant for spamminess. Spam filters are trained to look for advertisements, promotions or solicitations. It is best to avoid words like free, or any terms that sounds like a solition from a stranger.
5. Sending email from a "Free" email account (such as aol.com, hotmail.com etc.) will increase your spam penalty by around 20%. To avoid this penalty, use a Google Apps account or some other paid email address.
6. Make sure to include your name and phone number in your Signature. Your Signature is located at **Main:Settings:Preferences:Mail**. That same screen also has a return address - make sure that is filled in. This information is required to comply with federal regulations as well as email policies of major email vendors.

## Sending Printed Letters to Many People



It is possible to print letters to many people. Information on how to do that is available in the **Main:Mail** section of RealtyJuggler. From that section, click on the "Mass Print Letters" icon. The screen will display four drop-down menus. The first menu is "- Select Mailing To -" and allows you to send letters to people in your Contacts, Buyers Listings or Closings databases.

Next, you will want to click on the "Show Category:" drop-down menu in the upper-right part of the screen to further filter to whom you are sending your letter. For example, you might have a Newsletter category that you have applied to some of your Contacts. By selecting Contacts database in your "Print Letters for:" and then selecting "Show Category:" of Newsletter, you will be able to print letters only for those contacts who are in your Newsletter category.

A screenshot of a web form with several dropdown menus. The first dropdown is labeled "Print Letters for:" and has "-- Select Mailing To --" selected. The second is "Missing Address:" with "Skip Records with No Mailing Address" selected. The third is "Sort Order for Letters:" with "Alphabetical By Last Name" selected. The fourth is "Progress Note:" with "No Note" selected. Below these are two more dropdowns: "Use a message from:" with "Standard" selected and "template library" to its right, and "and then select an individual template to use:" with "-- Library Template --" selected.

Next, you will want to decide if you would like to print letters for all the records or to skip records that lack a mailing address. If you intend to hand-deliver the letter, then a mailing address may not be necessary.

Lastly, you will want to determine which letter you would like to use. Open the "- Library Template -" drop-down menu the template that you would like to use. You can select from the "Standard" drop down menu if you would like to select a template from the RealtyJuggler template library. Select "Custom" if you want to use your own custom Mail Form.

Click on the Download Letters button and an RTF file will be downloaded. This file should be opened using Microsoft Word to maintain proper formatting. Each page of the file will contain an individual letter. If you have installed a graphical letterhead, the header and footer will have your photo, company logo, and return address. Otherwise, the default text return address will be used instead.



## Sending Mass Email - Bulk Email



To send an email to many people, go to **Main:Mail:Bulk Email**. From there, select the database you want to use for example, Contacts). Select the category you want to use from the menu in the upper-right corner of the screen. Next, select the Mail template you want to use and then click on the "Create Mail Batch" button. RealtyJuggler will generate the necessary emails and queue them up for automatic sending. To see the Emails that have been generated, click on the "View Mail Queue" button at the top of the screen.

If you are looking to send an eNewsletter or eFlyer, we also offer integration with MailChimp which can provide additional capabilities for these specialized needs.

## Sending eNewsletters and eFlyers with MailChimp



RealtyJuggler can export an email mailing list direct to MailChimp for an eNewsletter or eFlyer. We highly recommend MailChimp because of their reasonable price and ease-of-use.

If your mailing list is less than 500 email addresses and you send fewer than 1,000 mass emails a month, then MailChimp is free. This is their **Forever Free** plan.

To integrate with MailChimp:

1. Go to <https://www.MailChimp.com> and sign up for their Forever Free plan.
2. Create an empty Audience in MailChimp. We will load/update that mailing list from RealtyJuggler.
3. Go to the **Main:MailChimp Newsletter** and follow the instructions in red and in bold.

Once configured, you can export and update your mailing list from RealtyJuggler to MailChimp with a single click. Both MailChimp and RealtyJuggler automatically handle compliance with unsubscribe requests, BounceBacks, spam complaints, as well as any other bookkeeping necessary to comply with federal CAN-SPAM regulations.

Video Tutorial 46 shows the process of setting up and sending a mailing list to MailChimp. The video tutorials are available by going to **Main:Tutorials**.

MailChimp has excellent deliverability, and you can even track who has opened your newsletter.

You can also synchronize Opt-Outs, Unsubscribe Requests, and Spam Complaints between MailChimp and RealtyJuggler by clicking on the "Sync Opt-Out List" button on the MailChimp screen.

Synchronization is in both directions and will update both the MailChimp as well as the RealtyJuggler Opt-Out lists.

*Multiple team members can combine their mailing lists into one jumbo company mailing list. To accomplish this, team members would send their individual list to the same MailChimp List. The result would be a combined, companywide list, suitable for a company newsletter.*

## Working with Multiple Categories

Video Tutorial 41 shows how to create a "Christmas" category and associate several contacts with that category. This same procedure can be used to create a "Newsletter" category or any other category that might be useful for bulk operation. This is ideal if you need to periodically use the category. For example, if you intend to send a mailing every month.

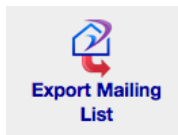
However, you might need to combine several categories on a one-time basis. For that, you can use "Select Multiple" to operate on several categories together. To do this:

1. Click on the @ (Mail) icon from the Main section of RealtyJuggler.
2. Click on the icon that represents what you want to do, for example Bulk Email.
3. Select from the "-- Select Mailing To --" menu the database you want to operate on, for example Contacts.
4. Select the "Select Multiple" menu item from the "Show Category:" menu upper-right corner of the screen.
5. Select the individual categories you wish to use from that same menu.
6. Once you have selected your categories, you can continue creating your message.
7. For general instructions for each of these screens, please review Video Tutorial 42 to see how bulk email works, Video Tutorial 46 to see how MailChimp works, Video Tutorial 13 for bulk printed letters, and video tutorial 11 for bulk labels/envelopes.

## Sending Mass Email using Google Contact Groups

RealtyJuggler can synchronize with Google Contacts. Video Tutorial 40 shows how to configure this capability. Once synchronized, the categories used by RealtyJuggler are converted into Google Contact Groups. To send an email to everyone within a contact group, type the contact group name into the TO (or BCC field of an email).

## Exporting an Email/Printed Mailing List



RealtyJuggler has the ability to export your database email addresses (or mailing addresses) for use with third party bulk Email products. There are some excellent products available which make it easy to do Newsletters and other bulk Email activities. To export your data for these services, go to the **Main:Mail** section of RealtyJuggler and click on the appropriate

link for Export Mailing List icon. From there select which database you want to export. You can filter this list by selecting from the Show Category drop-down menu at the upper-right corner of the screen.

We have worked with several vendors and can recommend the following vendors:

ConstantContact.com

MailChimp.com

VerticalResponse.com

iContact.com

You can also use **Main:Settings:Export** to export more comprehensive data on your Prospects or Contacts.

## Printing A Letter

☑ Select multiple rows

| Date                 | To            | Drip Group - Subject  | Status  |
|----------------------|---------------|---|---------|
| today 10:45am        | John Anderson | Drip Group: ProspectGeneral Thanks                                  | Pending |
| Nov 11, 2009 10:45am | John Anderson | Drip Group: ProspectGeneral How Can I Help?                         | Pending |
| Nov 18, 2009 10:45am | John Anderson | Drip Group: ProspectGeneral Buy or Sell First?                      | Pending |
| Nov 25, 2009 10:45am | John Anderson | Drip Group: ProspectGeneral Selecting the Right Real Estate Agent   | Pending |
| Dec 2, 2009 10:45am  | John Anderson | Drip Group: ProspectGeneral What's the Real Estate Market Like?     | Pending |
| Dec 9, 2009 10:45am  | John Anderson | Drip Group: ProspectGeneral Do you need a Good Real-Estate Advisor? | Pending |

Download a printable document of Pending Letters Due within 24 Hours that have Media of . Pending Mails with Media of @ are sent automatically on Date via Email.

When you create a letter or Drip sequence, you have the ability to select your "Media:" from the drop-down menu. The choices are Email and Print. For Email, the letter will be sent automatically on the date and time specified. For Printed Letters, you will need to download and print your letter. The screenshot to the left shows a series of letters that have been queued for printing. One is set to go out today and the rest are set to go out over time.

To download the one letter that is due to go out today, click on the Download link at the bottom of the screen. All letters that match the date criteria (in this case 24 hours) will be downloaded as an RTF file. The format of this file is suitable for viewing and printing from within any Microsoft Word. Once you download the file, you will be asked if you want to add the addresses to the Queue. If you click "OK", then you will have an easy way to print mailing labels later. If you click "Cancel", no labels will be queued, but the letter will still be downloaded.

After download, the Status of all letters downloaded will be set to Printed.

## The Format of a Printed Letter

When you print a letter in RealtyJuggler, the resulting letter is printed in a format called Block Letter Format. What that means is that your letter contains the following four elements:

1. Your Name & Address
2. The Date
3. The Name and Address of your Recipient
4. The Body of your letter

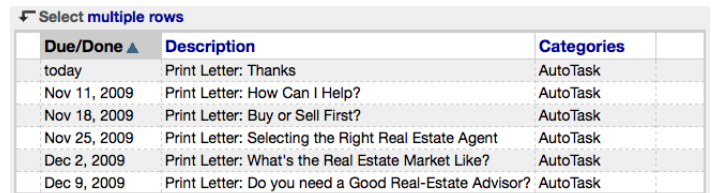
The last element is the part that you edit within the Mail section of RealtyJuggler. The other three elements are automatically added to printed letters. If you would like to omit any of these first three elements, you can do so by adjusting your preference settings.

The particular preference settings are located at **Main:Mail:Letterhead** by clicking on the Printed tab. To eliminate your Name and address, select from the Return Address: drop-down menu. To control the

display of the date in your letter, select from the Date: drop-down menu. To control the display of the recipient address, select from the Recipient Address: drop-down menu.

## Printing and Tasks

Letters that are to be printed will be displayed in your task list as items you will need to do. An example of a series of tasks related to a drip campaign is shown in the screenshot to the right. Click on any one of these tasks and you will go to the mail list for that record. From there, you can



| Due/Done ▲   | Description   | Categories |
|--------------|---|------------|
| today        | Print Letter: Thanks                                  | AutoTask   |
| Nov 11, 2009 | Print Letter: How Can I Help?                         | AutoTask   |
| Nov 18, 2009 | Print Letter: Buy or Sell First?                      | AutoTask   |
| Nov 25, 2009 | Print Letter: Selecting the Right Real Estate Agent   | AutoTask   |
| Dec 2, 2009  | Print Letter: What's the Real Estate Market Like?     | AutoTask   |
| Dec 9, 2009  | Print Letter: Do you need a Good Real-Estate Advisor? | AutoTask   |

print the letters you need. The tasks will automatically go away once you have printed the letters. If you decide that you do not want to print any of the letters, you can delete them from this list, it and associated tasks will disappear as well. Letters that go out using Email are not listed as tasks in your task list, as those letters will go out automatically and require no action on your part.

## Printing and Viewing ALL Pending Mail



You can view all Emails and Printed letters that you have sent or that are still pending from all of the records in your database by going to the **Main:Mail** section and clicking on the **View All Mail** icon.

This will take you to a screen that allows you to review all of your Mail, both printed and Email.

You can filter exactly which letters are displayed (Email, Print, or Both) using the drop-down menu in the upper-right corner of the screen. The tabs "Unsent Mail" and "Sent Mail" allow you to filter based upon whether the letter has been sent or not.

If you click on one of the rows in the table, you will go to the summary list of all letters for that particular record. From there, you can edit the letter, delete it, or change the media.

**A link at the bottom of the screen allows you to download/print all letters that are due. This is handy if you have several drip campaigns going on and want to print letters from multiple campaigns all at once.**

**If you get behind in a drip sequence, click on row representing the letter that is late. You will then see the drip sequence in a new list, and you will be given the opportunity to shift the unprinted letters in your drip sequence forward in time.**

If you are finding that displaying this screen is sluggish, go to the **Main:Settings:Preferences:Mail** section. From there you will want to change the "Summarize Sent Mail" drop-down menu. The default is to never truncate letters. If you are a prolific letter writer, you may find that you have thousands of letters in your sent mail list. This large list of letters can slow things down. By selecting a date range to retain your sent mail, you allow the system to trim the body from letters after they have been sent after a set period of time (for example, 3 months).

## Printing A Single Mailing Label or Envelope

To print one mailing label or envelope, go to the Contacts database, click on an individual contact, and then click on the "Label" tab to the left. A text field will contain the name and mailing address for this contact. You can edit the way that the name is display by clicking on the "Address" tab to the left and editing the "Envelope To:" field. This same tab allows you to specify if the Work, Home, or other address is used for a mailing address.

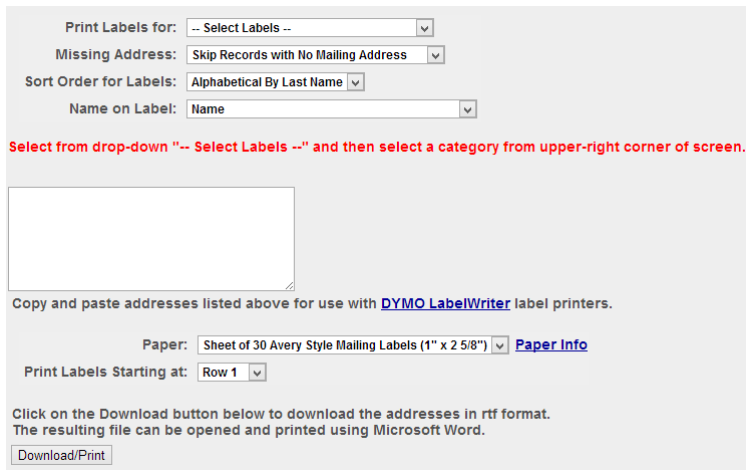
Select from the "Paper:" drop-down your choice of a sheet of labels or direct printing on an envelope.

If you select a sheet of Avery Style mailing labels, you will see a grid of checkboxes. You can select which labels you would like to use from the 30 possible locations on the sheet. This allows you to print several duplicate labels and allows you to re-use a sheet of labels by printing on a specific location of a partially used sheet of labels.

If you are using a label printer, you can copy the mailing address directly from the large text field and paste into your label printing software.

Lastly, click on the "Download/Print" button. An RTF file will be downloaded, which can be opened within Microsoft Word. You can then print this sheet of labels or print directly to your envelope.

## Printing Many Mailing Labels or Envelopes



The screenshot shows a web interface for printing mailing labels. It includes several dropdown menus: "Print Labels for:" with a selection of "-- Select Labels --", "Missing Address:" with "Skip Records with No Mailing Address", "Sort Order for Labels:" with "Alphabetical By Last Name", and "Name on Label:" with "Name". A red instruction reads: "Select from drop-down '-- Select Labels --' and then select a category from upper-right corner of screen." Below this is a large empty text area. Further down, it says "Copy and paste addresses listed above for use with [DYMO LabelWriter](#) label printers." There are two more dropdowns: "Paper:" set to "Sheet of 30 Avery Style Mailing Labels (1" x 2 5/8")" and "Print Labels Starting at:" set to "Row 1". A "Download/Print" button is at the bottom. A note states: "Click on the Download button below to download the addresses in rtf format. The resulting file can be opened and printed using Microsoft Word."

To print many mailing labels or many envelopes, click on the "Mail" icon from the "Main" section. Next, click on the "Print Many Mailing Labels or Envelopes" link. You will see a "—Select Labels —" drop-down menu that allows you to select where you want to get the addresses from. You can select from a number of sources including Contacts, Prospects, Buyers Listings, and the Label Queue. If you have queued mailing labels, select the Mailing Queue as your option. If you would like to print labels from a particular database, pick the database and then select a

filter criteria from the "Show Category:", drop-down menu in the upper-right corner of the screen.

Next, you will have the option of skipping records with no mailing address. This is normally what you will want to do. However, if you are hand-delivering letters, then a mailing address may not be necessary, and you can select the other option from the drop-down menu.

Next, select how you would like to print the labels. There are two choices, a sheet of Avery style mailing labels or printing directly on envelopes. If you have a label printer, you can copy that information from the addresses field and paste it into your label printer software.

If you need to delete an individual label, you can edit the text field before downloading the labels. Just keep in mind that any editing you do will only be in effect for this one print job.

Click on the "Download/Print" button when you are ready to download the labels or envelopes as an RTF file. This RTF file can be opened and printed within Microsoft Word.



If you used the label queue as the source for your labels, you will be asked if you would like to delete the label queue. Normally, you would want to say yes, as after you have printed your labels you want to start with an empty queue. The labels that you print from your queue will be in the exact order in which you printed your letters. If you need to empty your label queue, you can click on the "Empty Label Queue" link at the bottom of the screen.

Some agents employ a two-tier approach to sending newsletters. If an email address is available, they send an email. If not, they send a printed letter. If that's what you want to do, select from the "Missing address"



drop down menu the "Skip records with email address" menu item. That way, you only print mailing labels for contacts that do not have email addresses.

The **Name on Label:** drop-down menu allows you to select special undeliverable mail instructions. If you need to specify that the mail should be delivered, even if the name on the envelope is incorrect, then specify "Name + or Occupant". If you would not like to include the name at all and use "Occupant in its place, then select the "Occupant" option. The "Return Service Requested + Name" option will place the postal service directive "Return Service Requested" at the top of the label. The option "Address Service Requested + Name" adds the directive "Address Service Requested" at the top of the label.

## Printing Directly on Envelopes

To print directly on an envelope, select "Envelope" from the "Paper:" drop-down menu in the RealtyJuggler **Main:Mail:Labels & Envelopes** screen. Follow the same steps for printing labels but select Paper: Envelopes. Click on the "Download/Print" button and open the .rtf file that RealtyJuggler downloads.

If you don't have Microsoft Word, you can change the default format to .pdf by going to **Main:Mail:Letterhead:Labels** and changing the default file format.

When you open the downloaded .rtf file in Microsoft Word, the document is pre-formatted for #10 Envelopes. To change the paper size from Microsoft Word, click on the "Layout" ribbon tab at the top of the screen. Click on the "Size" icon and select the envelope size from the drop-down menu. If your Microsoft Word displays menus, you can also access this choice from the "Page Setup..." menu item located in the "File" menu.

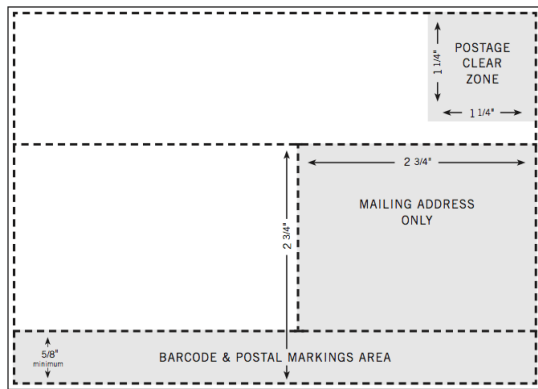
If the return address is clipped, you can adjust your Envelope margins by going to **Main:Mail:Letterhead** and clicking on the "Labels" tab at the top of the screen.

## Printing Return Address Labels for Yourself

If you are looking to print a sheet of return address labels for yourself, here are instructions:

1. Create a Contact record that represents you. Make sure to enter your name, company, and title into the **General** tab.
2. Click on the **Address** tab on the left and enter your mailing address.
3. Click on the **Mailing Label** tab on the left. There is a grid of checkboxes. Check them all.
4. Click on the **Download/Print** button to download your return address labels.

## Printing Addresses Directly on Postcards



RealtyJuggler also allows you to directly print your mailing address on postcards like Avery 8577 or Avery 8387 which have 4 postcards on a single 8 1/2" by 11" sheet of card stock. You can also print Jumbo 2-up cards which are 8 1/2" x 5 1/2". RealtyJuggler will print the addresses on the location required by the United States Postal Service. The image to the right shows where the address will be printed on each postcard. To print labels on postcards, select from the "Paper:" drop-down menu the Postcard option. This option is only available from the Many Mailing Labels or Envelope screen and is not available when printing a single mailing label or envelope.

## Spanish Versions of Letters

Each letter in the RealtyJuggler letter library has a Spanish version. To use the Spanish version of a letter, click on the Spanish Template option from the drop-down menu allowing you to select which template library you will draw upon. Next, select the specific letter you would like to use. The description of the letter is in English for your convenience.

## Graphic Headers and Footers/Letterhead

RealtyJuggler has the ability to include a graphical header and footer for all of your emails, printed letters, and reports. This graphical header can include a company logo, a photo and additional contact information. Since the header and footer are graphical, they are an easy way to provide common branding for all of your marketing material.

Instructions on how to install this graphical header and footer as well as samples are available from the **Main:Mail:Letterhead** section of RealtyJuggler.

This letterhead is automatically used for all of your Emails, Letters, and Reports.

Your letterhead consists of two parts - a Header part and a Footer part. The Header part is displayed at the top and the Footer part is displayed at the bottom. You can have a Header and Footer, or just one, or none at all.

### Printed Letterhead Guidelines:

- If you have stationary for Microsoft Word, send it to us and we can install it into your RealtyJuggler account.

- **All images in your Microsoft Word document should be reduced in size by at least 50%. In order to get this higher resolution on images in a Microsoft Word document load the image, right click on the image and make adjustments accordingly. Images that are reduced will look sharp when printed.**
- Your letterhead Header and Footer must be in the Header and Footer part of your Microsoft Word document.
- We highly recommend using Microsoft Word to create your letterhead.
- The Header and Footer can be no wider than 6 1/2".
- The Header can be no higher than 1" high and the Footer no higher than 0.75" high. If you use no footer, then your header can be no higher than 1.5" high. **If your header or footer is outside of these maximums, it will be scaled to fit.**
- Your header and footer are placed at the top and bottom of every page of your letter. This is not a signature, which would go at the end of the letter on the last page of the letter. You can edit your text signature by going to **Main:Settings:Preferences:Mail**.

#### **Email Letterhead Guidelines:**

- Most of the time we can convert your printed letterhead for use in your emails, providing you a consistent look for all of your marketing materials. Our conversion process is simple – we just shrink proportionally the printed letterhead width to 550 pixels wide. If you choose that option, you can skip past the below email guidelines.
- Your Email Header and Footer image should be no wider than 550 pixels. Images that are wider than 550 pixels will cause your Email to be unreadable on SmartPhones such as the iPhone.
- The height of your Email Header and Footer can be whatever you like.
- A simple Header and Footer are often the best.
- If you already have HTML stationery, we can convert it for you. The process of conversion involves converting all HTML to an image.
- If you want your graphical header and footer to have a clickable weblink attached to them, sign into RealtyJuggler, click on the Account link in the upper-right corner of the screen and fill in the "Web Site" link URL.
- Not everyone that gets your email will see your graphical header and footer. Many people turn off graphics for email for security reasons and some email readers, by default, do not display images. With that in mind, always include your contact information in your text Signature, even if it is already in your graphical header or footer. You can edit your text signature here **Main:Settings:Preferences:Mail**. Your text signature is the second large field on that screen.

#### **Sending Us Your Graphical Header and Footer:**

Once you have a letterhead, send it to us and we will install it into your account.

[Letterhead@RealtyJuggler.com](mailto:Letterhead@RealtyJuggler.com)

For a printed letterhead, email us your Microsoft Word document and we will do the rest. Normally, we will reduce the printed letterhead for use in emails. If you prefer to use a different header and footer for emails, send us the images as an attachment.

**For best results, we recommend using logos and photos that are as high resolution as possible. That will produce razor sharp results when printed.**

## **Tracking if an Email has been Read/Opened**

RealtyJuggler can track who has opened your emails. This is done by including a tracking image to all the emails that you send from RealtyJuggler. When someone opens your email and views images, the email status changes from "Sent" to "Sent+Read". Additional information on this feature is available here:


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

## Showing Feedback

Your Listing records contain a "Showings" tab. That tab allows you to keep track of everyone who has seen your listing. By entering the Agent contact information, you can track feedback and follow-up should the price of the listing change. You can solicit feedback from your showing agents via email. To do that:

1. Click on the "New Showing" button at the top of the screen. Enter the agent contact information in the top half of the form. The bottom half of the form contains feedback information.
2. Click on the "Send Email to showing agent with a link to an online feedback" link to solicit feedback. You will then go to a New Mail form.
3. Enter the agent's email address in the "To:" drop down menu and click on one of the choices at the bottom of the screen. The choices are as follows:
  - a. Send Email with a link to an online form [asking your seller to enter agent contact information for showings](#). The information is automatically sent to you as an email and a new showing is created in RealtyJuggler. (Spanish [Email](#))
  - b. Send [Email to showing agent](#) with a link to an online feedback form asking the agent to enter feedback for the showing. The information is automatically sent to you as an email and the showing info is added to RealtyJuggler. (Spanish [Email](#))
  - c. Address this Email to [ALL showing agent\(s\)](#) who have seen the Seller's home.

Dear Jack Adams:  
Thank you for showing my listing at: 12 main Street.  
Could you please take a few moments and tell me what you and your clients thought?



Purpose of Showing:

Your Clients Interest Level:

BEST Aspect of Listing:

WORST Aspect of Listing:

Rate Price:

Rate Exterior:

Rate Interior:

Additional Feedback:

Automatic tasks will keep you on track within soliciting feedback from your showings. They will remind you to get feedback on the showings. By checking off the automatic task, the "Last Followed-Up Date" field will be filled in with the current date.

The photo of the house is automatically added to the form if you upload a photo to the "Notes & Files" tab within the Listing record and select a Mail Merge Variable: %HomePhoto%. For best results, we recommend selecting Maximum Width: 300px when you upload the photo.

## Sending an Email to ALL Showing Agents

Listing records have a number of special letters that you can use. To access these records, click on a Listing record and click on the Mail

Looking for some inspiration?  
Use a message from the:  template library  
and then select an individual template to use:

@ Address this Email to [ALL showing agent\(s\)](#) who have seen the Seller's home.

👉 [Send email by hand.](#) (Pending Email is automatically sent.)

🖨 To PRINT [click here](#) and use the Download link on the Mails form.

@ [Edit Custom Mail Forms](#)

Tab to the left. Click "New Mail" button at the top of the screen. At the bottom of the mail form, you will see a number of links.

The first link allows you to send a message to your Seller providing them with an online web form that they can fill out any time they get contact information from an agent who has shown the home. This can be particularly convenient if agents leave behind a business card after they show a home. If your client enters this contact information, you will receive an email with that contact information and a new "Showing" will be created in the "Showings" tab for that Listing record.

If you have entered contact information for an agent who has shown your listing, you can request feedback via email using a special online form. The second link at the bottom of the screen allows you to send an email with a link to an online form soliciting feedback. If the showing agent fills out the online form, you will receive an email with the information entered and the appropriate showing information will be added to the Showings section of the Listing record.

A third option is also available. This option allows you to send an email to all showing agents. This is handy to inform all showing agents of a price change or other change in the salability of the home. This is also a handy way to keep up with showing agents.

## Custom Showing Feedback Letters

RealtyJuggler comes with standard Showing feedback solicitation letters that you can use. If you would like to customize these letters:

1. Go to **Main:Mail:Mail Forms**
2. Click on "New Mail Form" and then select from one of the library letters from the drop-down at the bottom of the screen. There are several Showing - letters listed to start with. Modify the letter as you wish.
3. When you need to use the form, click on the drop-down menu at the bottom of the Showing or Offer screen (the detail view, not the summary list) of your Listing or Buyer record. You will see your custom forms listed at the bottom of this drop-down. Custom forms will only be listed if you are using mail merge variables in your custom form that relate to showings. For example, %ShowingAddress%.

## Programming the @ Icon to Launch your Email program

To the right of email addresses in RealtyJuggler is a large @ icon. By clicking on that icon, you can

launch your browser's default email program and pull up a simple email template already pre-addressed to that person, with the name of recipient and your signature mail merged in. This is a perfect way to write a quick note to someone.



**Troubleshooting:** Does clicking on this icon launch the wrong email program? Do you want to launch a different email program? The below instructions will help you configure this option.

### ***For Google Chrome + Gmail Users***

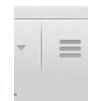
1. Open Gmail in Chrome.
2. Click on the protocol handler icon in the address bar/omnibox (it looks like double diamonds and is next to the star).
3. Select the option to use Gmail for mailto links.

If you do not see the double-diamond:

4. Empty the Internet Cache Google Chrome, including deleting "Cookies and other site data" and also deleting "Site Settings"
5. Navigate to this link in Chrome: **chrome://settings/handlers**
6. Make sure the slider for "Do not allow any site to handle protocols" is turned off. If you see Gmail listed, click on the three dots to the right, and select "Remove".
7. Close all windows in your browser and try steps 1 - 3 again.

### ***For Firefox Browser Users***

1. Click on the drop-down menu in the upper-right corner of the Firefox window. This drop-down looks like three lines. Select the "Preferences" icon from the menu.
2. Under the "General" tab type "mailto" into the "Find in Preferences" search box.
3. Change the mailto handler in Firefox to the program you want, like Gmail.



### ***Telling Mac Mail what your Default Email Program Is***

1. Click on the Mail program.
2. From the **Mail** menu, choose **Preferences**.
3. Click the **General** button.
4. Choose your desired default email application from the "Default Email Reader" pop-up menu. If you want Gmail, select "Chrome", and follow the instructions listed above "For Google Chrome + Gmail Users". Safari web browser is incompatible with Gmail in this regard.

## **For Windows 10**

Launch the Default Programs app by typing "Default Apps" into the Cortana / Ask Me Anything / Search the Web and Windows search box at the bottom of left the screen by the Windows icon button and then clicking it.

1. Within the Default Programs App, scroll to the bottom and click on the "Choose Defaults by Link Type" option. On this new screen, scroll to the MAILTO section. To the right of this entry, select the program you would like to be launched.
2. Choose Google Chrome if you are using Gmail. Next, launch the Chrome browser, and go to Gmail.com. Click the Handlers (double diamond) icon at the right edge of the address bar, and "Allow" mail.google.com to open all email links.
3. If you do not see the Handlers icon in your address bar when you go to Gmail.com, click the "Customize and Control Google Chrome" button (three vertical dots) in the far upper right and choose the Settings option from the drop-down menu. Click on "Privacy and security" on the left. Next, under the "Privacy and security" section, click on "Site settings". Scroll down and expand the section called "Additional permissions", and then click on "Protocol handlers". If your email handler is not "mail.google.com", click the three vertical dots to the right, and choose "Remove". Then go back to Gmail.com and try step 2 again.

MAILTO  
URL:MailTo Protocol

## **Microsoft Word**

You can use Microsoft Word 2003 or later to open, edit and print labels and letters.

**We do NOT recommend using Apple Pages or OpenOffice.org.**

## **Using Adobe Reader instead of Microsoft Word**

If you don't have Microsoft Word, you can download and print as a .pdf document. To specify which format you prefer, go to Main:Mail:Letterhead:Labels and Mail:Mail:Letterhead:Printed and change the default document from .rtf to .pdf.

## **Making Microsoft Word the Default for .rtf Files**

RealtyJuggler downloads .rtf files for labels, envelopes, and printed letters. If you are viewing these files within a program other than Microsoft Word - perhaps WordPad or TextEdit, you will need to adjust the default settings to open .rtf files in Microsoft Word. Here's how to do that:

1. Locate an .rtf file and right-click on it from your Desktop or Downloads folder. That will bring up a drop-down menu.
2. On a Macintosh: Select "Open With..." menu item and then select "Other" from sub-menu. Check off the Checkbox "Always Open With". Find Microsoft Word from list and select it.
3. On a PC: Select "Open with..." menu item and then select "Choose another app" from submenu. Check off the Checkbox "Always use this app to open .rft files". Find Microsoft Word in the list and click on it. Click "OK" button to save these settings.



## Microsoft Windows Instructions

### How to set MS Word as the default program to open .RTF files

**1) Right-click on a .RTF file**

**2) from the "Open with" sub-menu, click: Choose another app**

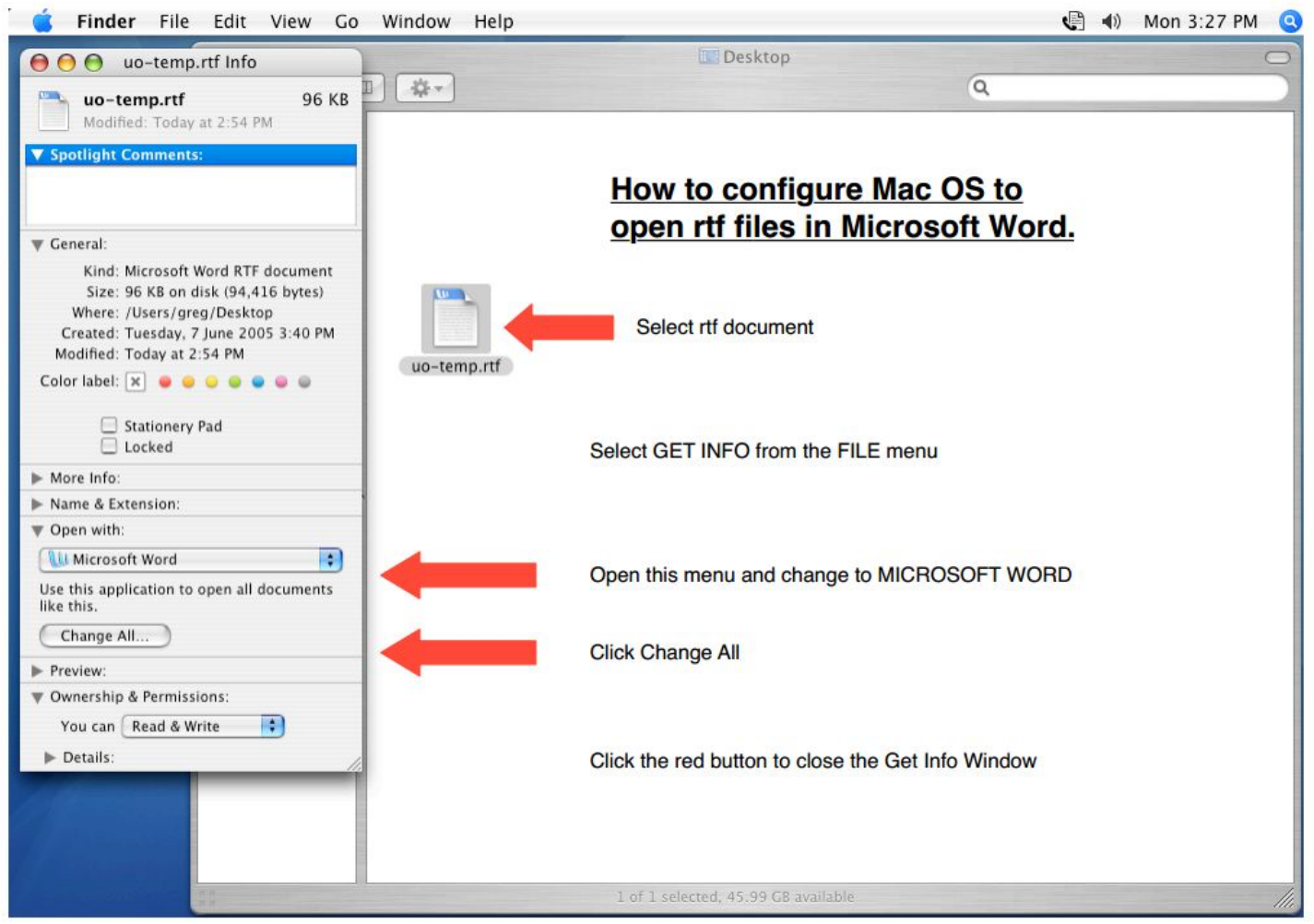
**3) Select Word**

**4) Check the checkbox for "Always"**

**5) Click OK**

The image shows a Windows desktop environment. In the top-left corner, there is a logo for 'RealtyJuggler'. The taskbar at the bottom features the Windows Start button, a search bar with the text 'Type here to search', and several application icons including the Task View icon and the Microsoft Word icon. The main content area displays a file named 'RJ\_Letters.rtf'. A right-click context menu is open over the file, with the 'Open with' sub-menu expanded to show 'Microsoft Word' as the selected application. A second dialog box, titled 'How do you want to open this file?', is shown to the right. It lists 'Notepad' under 'Keep using this app' and 'Microsoft Word' under 'Other options'. The 'Microsoft Word' option is highlighted in blue. Below this, there is a section 'Look for an app in the Microsoft Store' with a checked checkbox for 'Always use this app to open .rtf files'. An 'OK' button is visible at the bottom right of the dialog.

## Macintosh Instructions



## Converting a .PDF or .DOC to an Embedded Image for Email

Would you like to send a PDF flyer or newsletter as an email? If so, you can upload that file into RealtyJuggler and convert that file into an image. That way, the image can be embedded into your email. To do that:

1. Go to **Main:ALL Files** and click "New Attachment"
2. Pick your .PDF file from your computer by clicking on the "Choose File" button
3. If you have selected a .PDF file, a new check-box will appear "Convert to Image". Check that checkbox.
4. You will be given the chance to select which page in your .PDF file you want to convert. If your .PDF contains multiple pages, you will want to repeat this process for each page.
5. Once you have uploaded your images, you can embed them into a Mail Form. Video Tutorial 43, located at **Main:Tutorials** will show how to do that.
6. If you would like to send your Mail Form to a lot of people, take a look at Video Tutorial 42. That video will show how to take that mail form and send to many people.

Most email programs will not display images in emails from strangers. By stranger, we mean that your email address is not in the addressbook of the person you are sending the email to. This means that your email MUST make sense with images off. **Make sure to include enough text to explain what your email is about, assuming that the image is not immediately displayed. That way, you can avoid your emails being confused as spam.** You should also encourage everyone you know to add you to their address book. This is the single most effective thing you can do to avoid your email ending up in the Junk Mail folder. Spam filters can not understand what is an embedded image. So, they will automatically flag an email with just a small amount of text and a large image as an attempt to circumvent the spam filter. This is a second good reason to include sufficient text within all your emails so that the spam filter understands your intentions.

## Converting a Microsoft Publisher Document for Email

If you have a Microsoft Publisher document that you would like to use, you can follow these instructions:

1. Open your flyer using Microsoft Publisher
2. Go to File > Save As > Name the file to whatever you choose > Then underneath pick what you want to save it as, select jpeg (or png) the file type. Save the file to your desktop of your computer.
3. Sign into RealtyJuggler and go to **Main:All Files**. Upload the file you just saved.
4. Once you have uploaded your images, you can embed them into a Mail Form. Video Tutorial 43, located at **Main:Tutorials** will show how to do that.

## Embedding Videos into an Email

Video Tutorial 60 has instructions on how to embed videos into your Emails.

