



RealtyJuggler Jotform Integration



Version 1.0
November 13, 2024

RealOrganized™, Inc.

Organizational Software for Real Estate

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ISBN-978-0-557-12131-1

<https://www.RealtyJuggler.com>

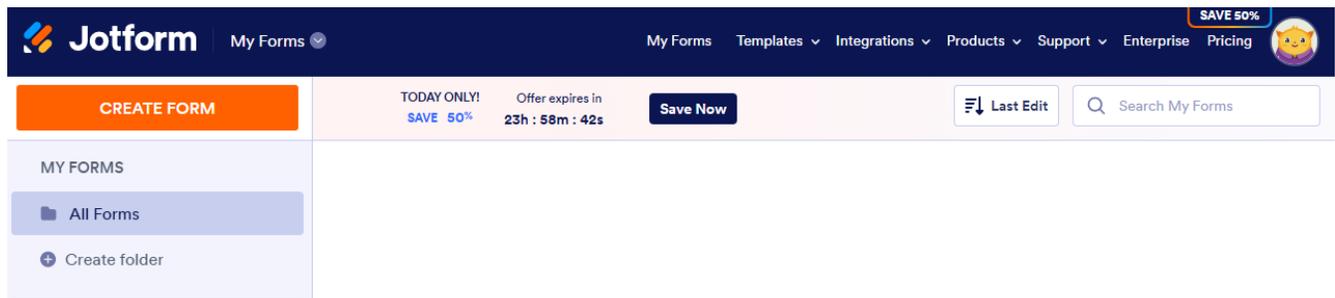
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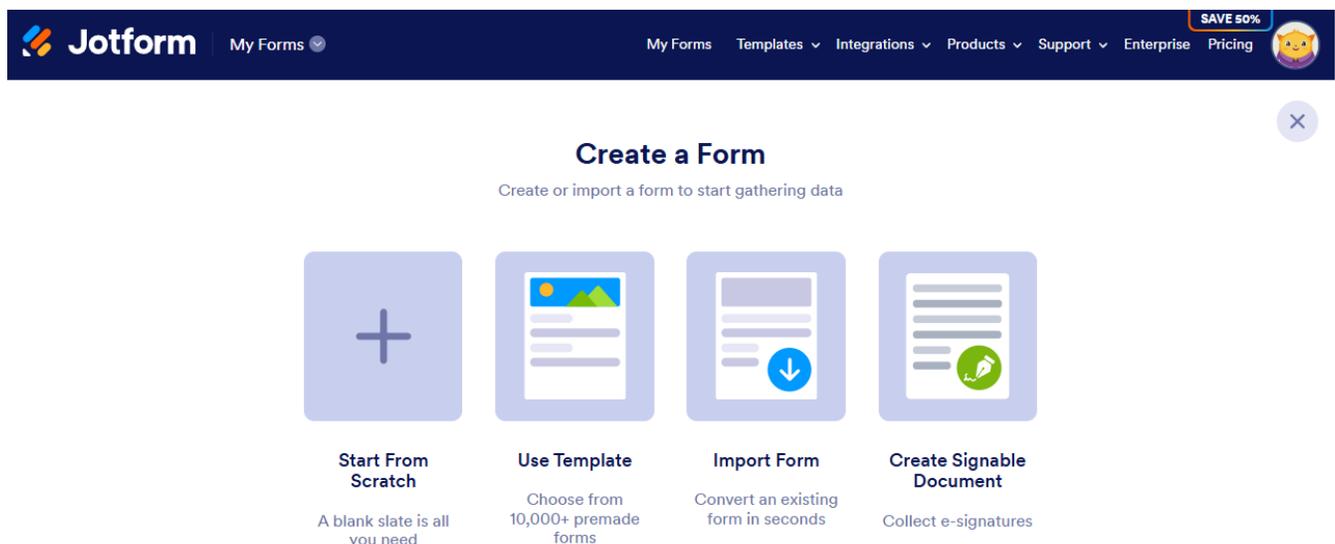
Jotform provides an easy-to-use form builder, with plenty of customization and pre-built form templates you can use. You can sign up for free and create up to five forms. There are different pricing tiers I can consider later if I need more forms or need to handle more volume through my forms than the Free plan allows.

| Starter | Bronze | Silver | Gold | Enterprise |
|---|--|--|--|---|
| FREE <small>* All Features Included</small> | \$34 /month <small>Billed annually</small> | \$39 /month <small>Billed annually</small> | \$49 /month <small>Billed annually</small> | Custom Price |
| 5 Forms <small>Form Limit</small> | 25 Forms <small>Form Limit</small> | 50 Forms <small>Form Limit</small> | 100 Forms <small>Form Limit</small> | Unlimited Usage |
| 100 <small>Monthly Submissions</small> | 1,000 <small>Monthly Submissions</small> | 2,500 <small>Monthly Submissions</small> | 5,000 <small>Monthly Submissions</small> | <ul style="list-style-type: none">FormsMonthly SubmissionsSigned DocumentsSubmission StoragePayment SubmissionsAPI and more... |

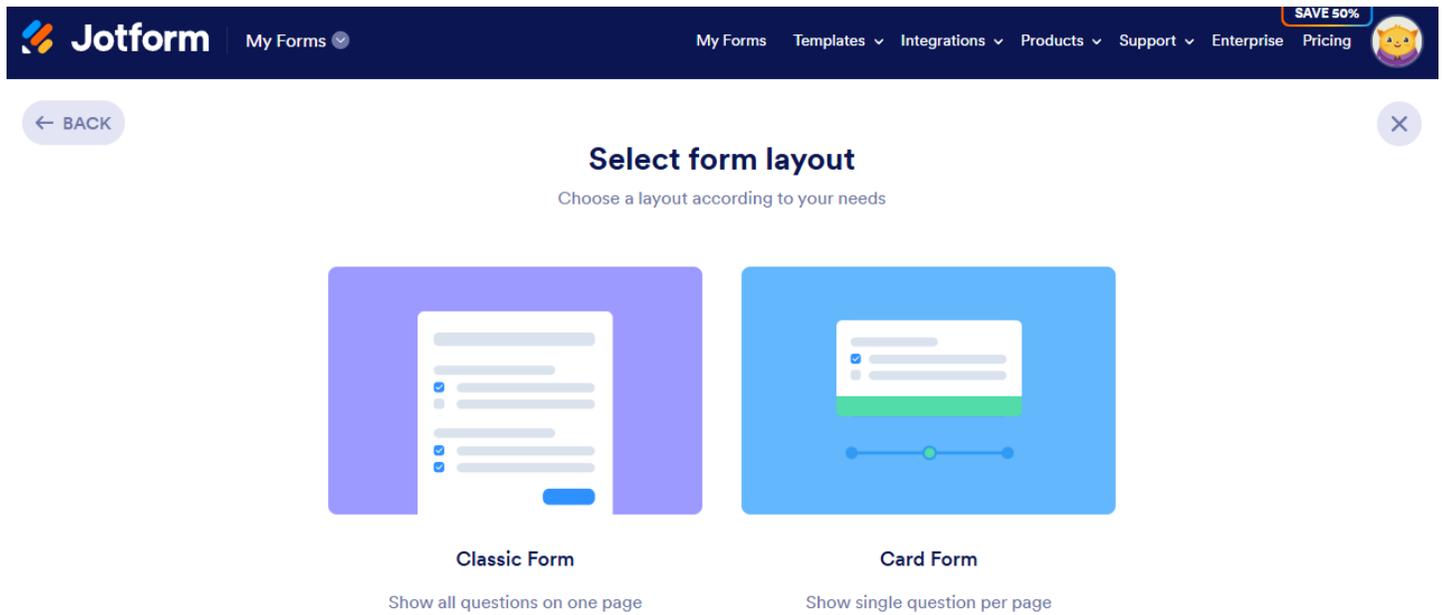
I'm going to create a "Contact Us" form for my website that automatically add submissions to RealtyJuggler's Prospect database. I will start by signing in to Jotform and clicking the orange "CREATE FORM" button in the upper-left corner of the page.



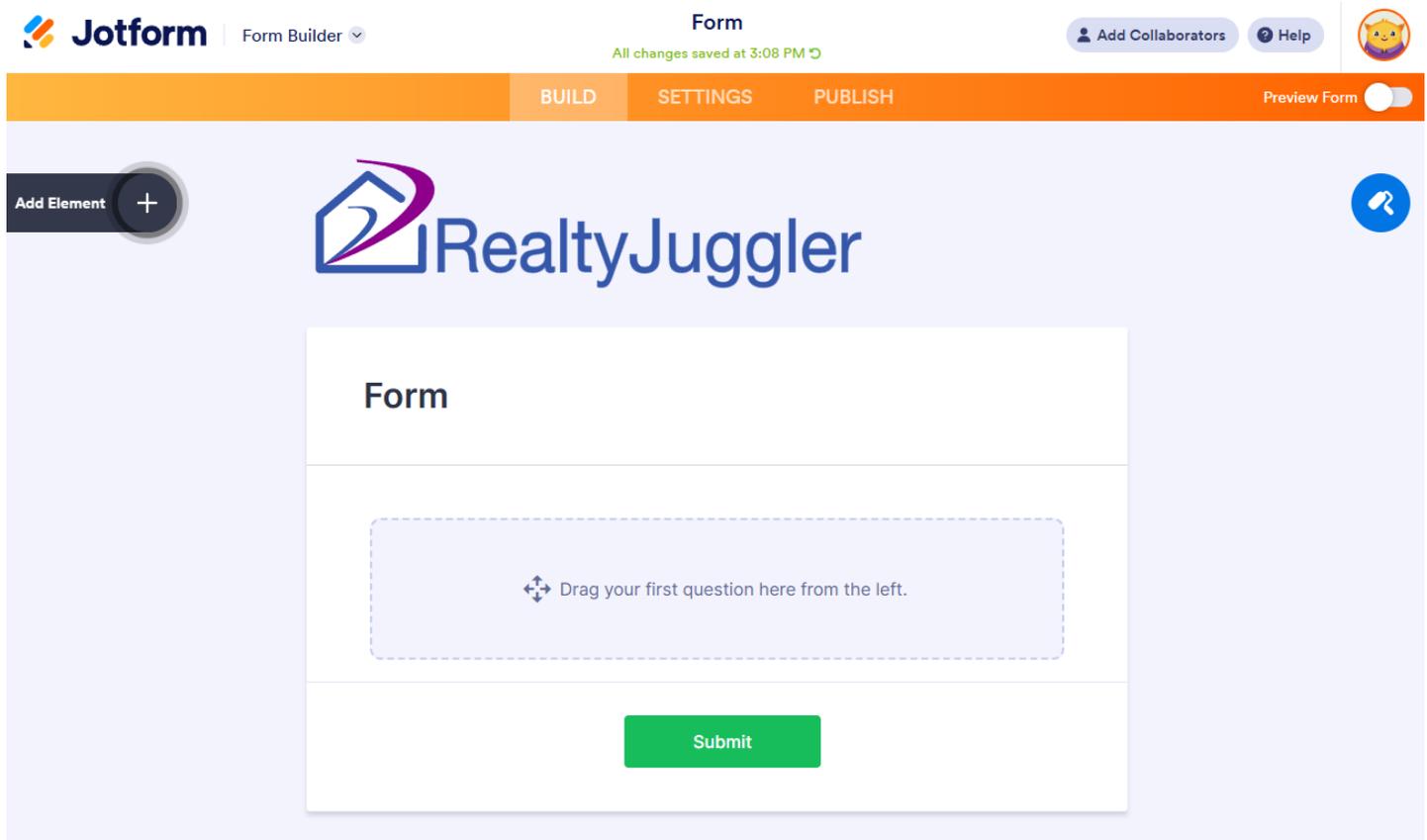
There are a lot of premade form templates I can choose from, but I want to choose my fields, so I'm going to select "Start From Scratch".



For the form layout, I'm selecting the "Classic Form", which displays all my fields on one page, rather than the Card Form, which displays one question at a time. This is just a matter of personal preference.



The dark gray "Add Element" button on the left opens a menu with various fields I can include in my form.



I can drag and drop the Form Elements I want from the left, into the form I'm building.

The screenshot shows the Jotform Form Builder interface. At the top left is the Jotform logo and 'Form Builder' dropdown. The top right shows 'Form' title, 'All changes saved at 3:08 PM', 'Add Collaborators', and 'Help' buttons. Below the top bar are tabs for 'BUILD', 'SETTINGS', and 'PUBLISH', along with a 'Preview Form' toggle. On the left is a 'Form Elements' sidebar with categories 'BASIC', 'PAYMENTS', and 'WIDGETS'. The 'BASIC' category is active, showing elements like Heading, Full Name, Email, Address, Phone, Date Picker, Appointment, Signature, Fill in the Blank, and Product List. The main workspace shows a form template with the 'iRealtyJuggler' logo at the top. Below the logo is a large white box labeled 'Form' containing a dashed box with the text 'Drag your first question here from the left.' and a green 'Submit' button at the bottom. A '+ ADD NEW PAGE HERE' link is visible at the bottom of the workspace.

First, I'm going to add a "Heading" to my Form, and I'll adjust the heading to "Contact Us" so that visitors to my website will understand the purpose of this form is to get in touch with me, or someone in my office.

This screenshot shows the same Jotform Form Builder interface as the previous one, but with a 'Heading' element added to the form. The 'Form Elements' sidebar remains on the left. In the main workspace, the 'Form' box now contains a heading element with the text 'Heading' and a subheader prompt 'Type a subheader'. Below the heading is a green 'Submit' button with a settings gear icon and a trash can icon. The '+ ADD NEW PAGE HERE' link is still visible at the bottom.

I'll drop in a field for my guest to provide me with their name, so I know who I will be contacting.

The screenshot shows the Jotform Form Builder interface. At the top, the Jotform logo is on the left, and 'Form Builder' is next to it. In the center, the word 'Form' is displayed above a green notification that says 'All changes saved at 3:11 PM'. On the right, there are buttons for 'Add Collaborators' and 'Help', and a user profile icon. Below the top bar, there are three tabs: 'BUILD', 'SETTINGS', and 'PUBLISH'. A 'Preview Form' toggle is on the far right. On the left side, a 'Form Elements' panel is open, showing categories 'BASIC', 'PAYMENTS', and 'WIDGETS'. Under 'BASIC', there are icons and labels for: Heading, Full Name, Email, Address, Phone, Date Picker, Appointment, and Signature. The main workspace shows a form titled 'Contact Us' with the 'RealtyJuggler' logo at the top. The form has a single text input field labeled 'Full Name' and a green 'Submit' button at the bottom.

I will also drop in fields for an "Email" address and "Phone Number", so that I have a couple ways to follow up with anyone who tries to contact me. I'll include a "Long Text" field so my visitor can provide me with any additional information they want me to contact them about. That's all I need for this form, so I'll click "Submit".

This screenshot shows the Jotform Form Builder interface with more form elements added. The 'Form Elements' panel on the left now includes 'Address', 'Phone', 'Date Picker', 'Appointment', 'Signature', 'Fill in the Blank', and 'Product List' under the 'BASIC' category. Below these, the 'BASIC ELEMENTS' section is expanded to show: Short Text, Long Text, Paragraph, Dropdown, Single Choice, Multiple Choice, Number, Image, and File Upload. The main workspace shows the 'Contact Us' form with the following fields: a 'Name' section with two input boxes for 'First Name' and 'Last Name', an 'Email' input box with a placeholder 'example@example.com', a 'Phone Number' input box with a placeholder '(000) 000-0000' and a note 'Please enter a valid phone number.', and a 'Long Text' input box. A green 'Submit' button is at the bottom.

Now, I can give my form a Title, so I can easily identify this form if I need to create additional forms in Jotform.

The screenshot shows the Jotform Form Builder interface for a form titled "Contact Us Form". The top navigation bar includes "BUILD", "SETTINGS" (which is active), and "PUBLISH". On the right, there are buttons for "Add Collaborators" and "Help", and a "Preview Form" toggle. The left sidebar contains several menu items: "FORM SETTINGS" (selected), "EMAILS", "CONDITIONS", "THANK YOU PAGE", "INTEGRATIONS", "WORKFLOWS/ Formerly Approvals", "JOTFORM SIGN", and "MOBILE NOTIFICATIONS". The main content area displays the "FORM SETTINGS" configuration for the form. It includes a "Title" field with the value "Contact Us Form", a "Form Status" section where the form is "ENABLED" (with a subtext: "Your form is currently visible and able to receive submissions"), and an "Encrypt Form Data" section with a "NO" toggle. A "SHOW MORE OPTIONS" button is located at the bottom of the settings panel.

Next, I will click on the "Emails" tab on the left and update the email address that will receive the notification when one of my website visitors fills out my "Contact Us" form. This is how I'm going to get my new leads into RealtyJuggler.

The screenshot shows the Jotform Form Builder interface for the same "Contact Us Form", but now the "EMAILS" tab is selected in the left sidebar. The top navigation bar is the same, but it now includes a green status message: "All changes saved at 3:33 PM". The main content area displays the "NEW EMAIL" configuration section. It starts with a "Select an email type below to create your email." instruction and a blue "Add Email" button. Below this, there are two email notification entries: "Notification 1" which is set to "Jotform" and "nathan.realtyjuggler@gmail.com", and "Autoresponder 1" which is set to "Jotform" and "Email". Each entry has edit and delete icons.

I'm going to look up my "Prospect" Email Feed address in RealtyJuggler. It's located on the Main:Settings:Email Feed screen, and is used for collecting new lead data in real-time to add to my RealtyJuggler Prospects database.

The screenshot shows the Jotform interface for editing a form titled "Contact Us Form". The left sidebar contains navigation options: FORM SETTINGS, EMAILS, CONDITIONS, THANK YOU PAGE, INTEGRATIONS, WORKFLOWS, JOTFORM SIGN, and MOBILE NOTIFICATIONS. The main area is in the "RECIPIENTS" tab of the "NOTIFICATION 1" settings. The "Sender Name" is set to "Jotform", and the "Reply-to Email" is "Email". The "Recipient Email" field contains "nathan.realtyjuggler@gmail.com". A warning message at the bottom states: "To use multiple recipients, please upgrade your account". Buttons for "TEST EMAIL" and "SAVE" are visible at the bottom.

My free Jotform account only allows one Recipient Email, so I'm going to remove my regular email address and paste in my RealtyJuggler Prospect Email Feed address. RealtyJuggler is going to send me an email notification for each submission, so I do not need to receive a duplicate notification from Jotform anyway. I will click the "Save" button at the bottom to update my new email notification preferences. Now I am ready to publish.

This screenshot shows the same Jotform interface as above, but the "Recipient Email" field now contains "Prospect.43391.488@realtyjuggler.com". The warning message is no longer present. The "TEST EMAIL" and "SAVE" buttons remain at the bottom.

I will click the “Publish” tab in the orange banner at the top of the page and now I can see a variety of options for sharing or posting this form.

The screenshot shows the Jotform interface for publishing a form. At the top, the Jotform logo and 'Form Builder' are on the left, and 'Contact Us Form' with 'All changes saved at 3:53 PM' is in the center. On the right, there are buttons for 'Add Collaborators' and 'Help', and a 'Preview Form' toggle. Below this is an orange navigation bar with 'BUILD', 'SETTINGS', and 'PUBLISH' tabs, and a 'Preview Form' toggle. The main content area is divided into a left sidebar and a main panel. The sidebar has several options: 'QUICK SHARE' (Direct form link and social share), 'EMBED' (Various web page embed options), 'ASSIGN FORM' (Assign your forms to others), 'EMAIL' (Reminders and instant sharing), 'PREFILL' (Pre-populate your forms), 'PDF' (Download fillable PDF), and 'PLATFORMS' (Third-party publish options, marked as 'NEW'). The main panel is titled 'DIRECT LINK OF YOUR FORM' and states 'Your form is securely published and ready to use at this address'. It features a 'SHARE WITH LINK' section with a 'Public Form' badge and a 'Settings' gear icon. Below this is a text input field containing the URL 'https://form.jotform.com/243036379042050', with 'COPY LINK' and 'OPEN IN NEW TAB' buttons. There is also an 'INVITE BY EMAIL' section with an upload icon and a text input field labeled 'To: Enter email addresses to send invitation with permissions.'. At the bottom of the main panel, there is a 'SHARE FORM' section with icons for Facebook, WhatsApp, X, LinkedIn, and a QR code, along with a '+ View more >' link. Finally, there is a 'CREATE APP' section with the text 'Create an app to store all of your forms in one place and easily share them with others. Start with this form!' and a 'CREATE APP' button.

Under the “Quick Share” tab on the left, I have a sharable URL that I can copy, or open in a new tab so I can send a test submission to add a new Prospect to RealtyJuggler.

The new record appears under the “Prospects” icon, under the Category “CallNow.”

Once I have confirmed my form is working properly, the “Quick Share” screen in Jotform provides me with options to share the form through one of my social media accounts, or to generate a QR Code.

The “Embed” tab on the left provides me with HTML Code that I can plug into my website or give to my webmaster so they can add the Contact Us form to my landing page.

Jotform even has a “PDF” tab on the Publish screen where I can download my new form as a fillable PDF file that I could send via text or email attachment.