Command Quick Guides

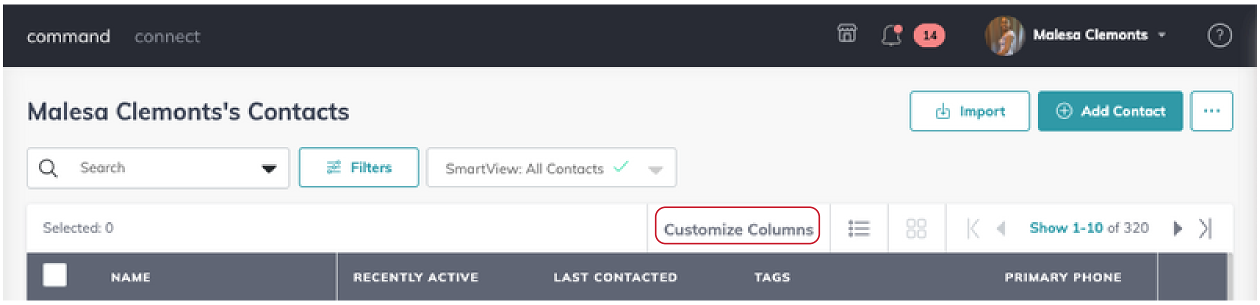
Your Guide to Command: Customizing Your Contact View

Customizing Your Contact View

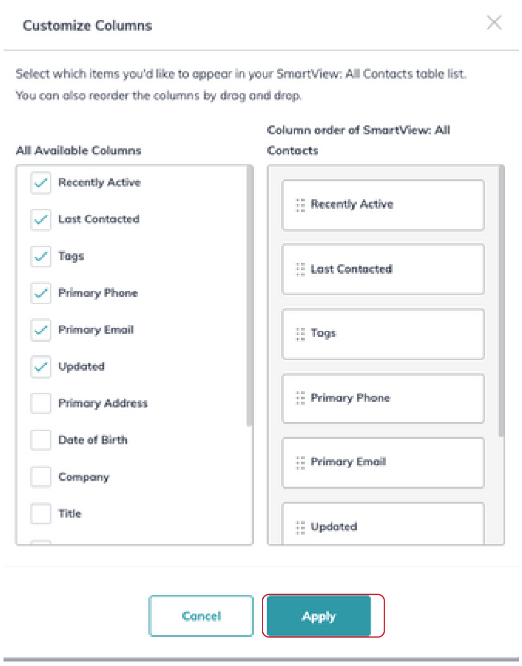
1. Log in to https://agent.kw.com with your Keller Williams login credentials.

2. Click the **Contacts Icon,**  on the left side panel.

3. Click **Customize Columns** at the top of the page.

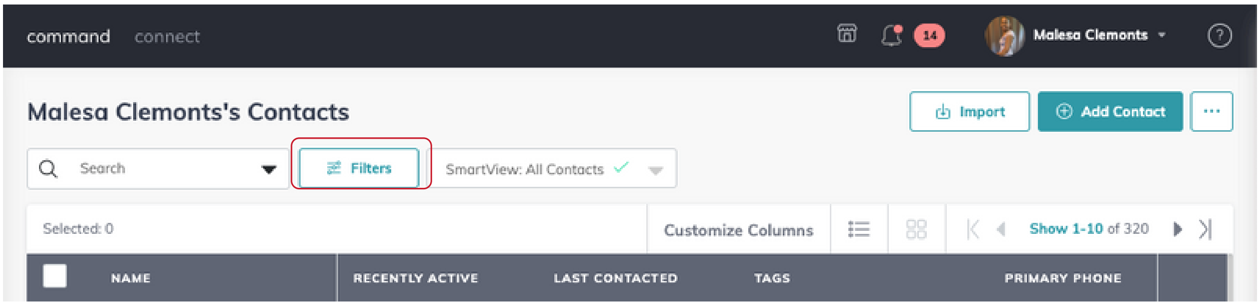


4. Choose which columns you want to display by using the checklist on the left. Then choose the order that you would like the columns to appear. Click and drag to rearrange the list on the right. Click Apply when you are finished.

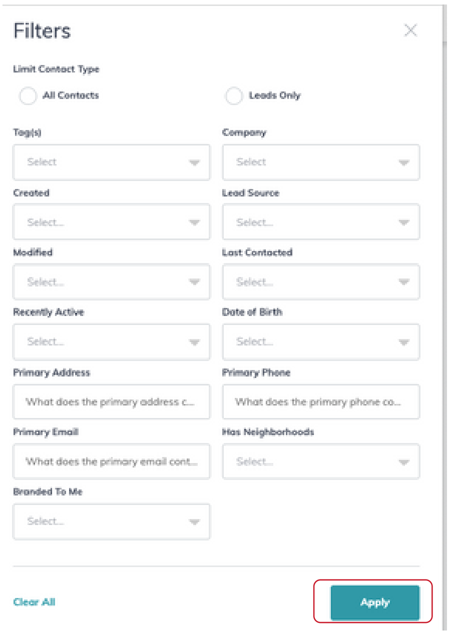


Filters

1. Click Filters at the top of the contacts page.

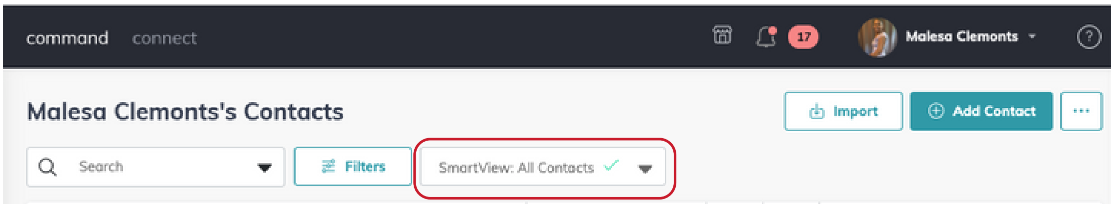


2. Choose which filters you want to apply. Click Apply when you are finished.

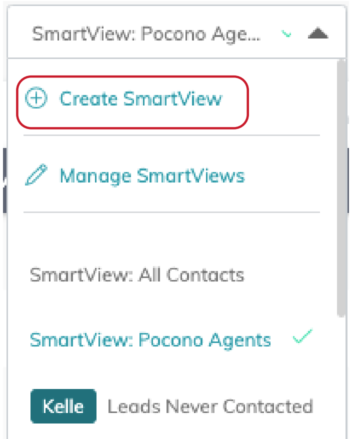


Create a SmartView

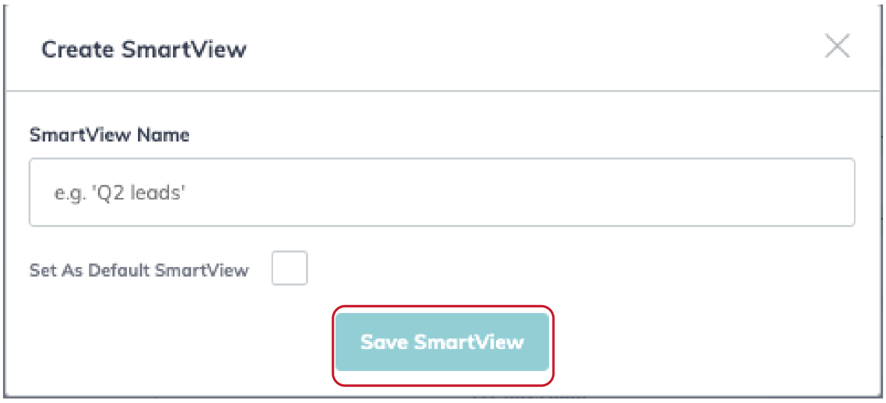
1. Once you have your filters selected
2. Click SmartView at the top of the page, then click Create SmartView.



3. From the dropdown menu, select Create SmartView

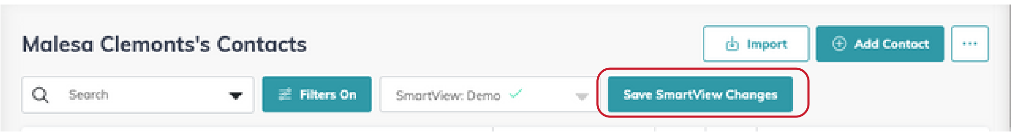


4. Name your SmartView and click Save SmartView. If you want to make this your default view any time you access your contacts, check the Set As Default SmartView box.

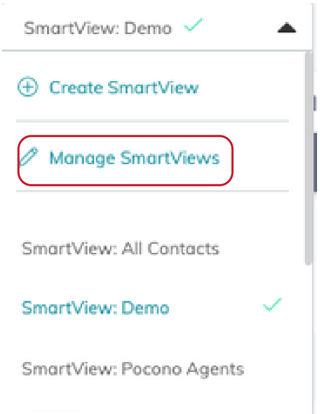


Edit a SmartView

1. If you make any changes made to the filters applied to the SmartView, you will see a new button that says Save SmartView Changes.



2. You can also rename or delete any SmartViews by clicking Manage SmartViews from the drop-down menu.



3. You can now rename, delete or make any SmartView the default.