



Command Quick Guides

Your Guide to Command: Adding Contacts to SmartPlans





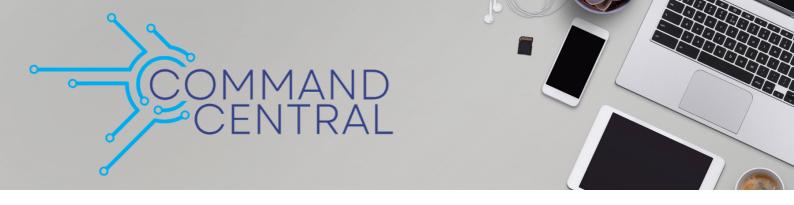
Adding Contacts to SmartPlans

- 1. Log in to https://agent.kw.com with your Keller Williams login credentials.
- 2. Click on the SmartPlans Icon $\mathbf{E}_{\mathbf{x}}$ on the left-side panel.
- 3. Click the Add Contacts Icon 🔍 next to the SmartPlan you want to use.

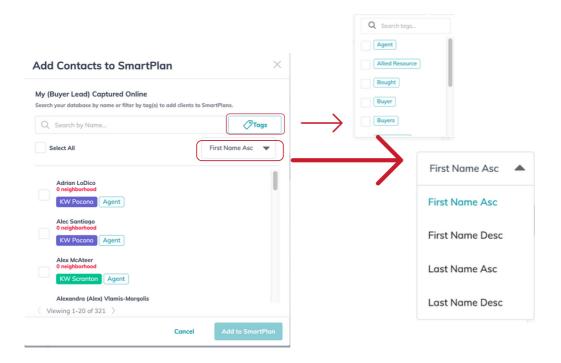
nar	rtPlans	My Smar	triuna	Library			Create
) Se	earch by SmartPla	n Name					
D	Twilio Account No	ot Connected.		e messages you need to p tPlace and set up a Twilio			scribe in KW MarketPlace
eople	Plans 6	Published					
eople	Plans 6 NAME	Published	CONTACTS	CREATED 🔻	DURATION	TOTAL TOUCHES	ACTIONS
	NAME	Published Buyer L	CONTACTS	CREATED 🔻	DURATION 90 Days	total touches	ACTIONS
eople	NAME R My (E						

4. A pop-up will appear with a list of your contacts. Check the names of the contacts you wish to add to the SmartPlan.

Search your database by name or filter by tag(s) to add	d clients to SmartPlan	s.
Q Search by Name		O Tags
Select All	First No	ame Asc 🔻
Adrian LoDico O neighborhood KW Pocono Agent		I
Alec Santiago O neighborhood KW Pocono Agent		
Alex McAteer 0 neighborhood KW Scranton Agent		
Alexandra (Alex) Vlamis-Margolis		



5. Filter your contacts by Tags or sort by name.



6. Once you select the contacts you want to add, click Add to SmartPlan.

Add Contacts to SmartPlan	×
My (Buyer Lead) Captured Online	
Search your database by name or filter by tag(s) to add clients to Sn	nartPlans.
Q Search by Name	Tags
Adrian LoDico × Alec Santiago × Alex McAteer ×	See All
Select All	First Name Asc 🛛 🤝
Adrian LoDico O neighborhead KW Pocona Agent	
Alec Santilado O neighborheod KW Pocono Agent	
Alex McAteer 0 neighborhood KW Scranton Agent	
Alexandra (Alex) Vlamis-Marqolis 0 neighborhood	
Viewing 1-20 of 321 >	
Cancel	Add to SmartPlan



6a. If any contacts are missing key information (phone number, email, birthday) you will see a pop-up prompting you to review contact errors. From here you can remove the contacts with errors, add them to the SmartPlan anyway, or export them to a CSV where you can review the errors and go back into contacts to correct the issues.

- 7. Choose when you want the SmartPlan to begin.
- Start all now the first step of this plan will begin immediately, once confirmed
- Start all on the following date use the calendar to select the date you want the SmartPlan to begin
- Stagger Start choose the maximum number of contacts to start on the SmartPlan, per day until all contacts are added

← Select Start Date ×	\leftarrow	Select	Sto	ırt D	ate			×	<	Select Start Date
When should the SmartPlan start? SmartPlan: My (Buyer Lead) Captured Online Review Contacts (4)	SmartF	should t Plan: My (B Contacts	uyer Le						Sr	Vhen should the SmartPlan start? martPlan: My (Buyer Lead) Captured Online eview Contacts (4)
Start all now SmartPlans will start immediately.	Ŭ	Start all or SmartPlans Start on								Start en 3/18/2023
Start all on the following date		3/18/20	23							Stagger start over the next few days
SmartPlans will start at the selected date. Start on		(-		Mar	ch 20	023	\rightarrow			Staggering allows you to distribute when the SmartPlan starts for a large group of people. You can choose to start the SmartPlan for X amount of people per business day until all are added to the SmartPlan.
3/18/2023		Su	Мо	Tu	We	Th F	r Sa	arts for a large group unt of people per		(Example: if you add 11 contacts to a SmartPlan and stagger 4 per day, then the SmartPlan would activate for 4 contacts today, 4 tomorrow, and 3 on the third day).
Stagger start over the next few days		5	6	7	8	9 1		er 4 per day, then the		Maximum contacts per day
Staggering allows you to distribute when the SmartPlan starts for a large group of people. You can choose to start the SmartPlan for X amount of people per business day until all are added to the SmartPlan.			13	14		16 1	7 18			2
Heads up! • If you have a Twilio account set up, all text messages will automatically be sent from your Twilio number.			lio acco	iunt set	up, all t	ext messo	ges will (utomatically be sent from your		eads up! • If you have a Twillo account set up, all text messages will automatically be sent from your Twilio number.
② WARNING! You must comply with the TCPA and any other federal, state or local laws, including for business to-business colls and tests. Never call or test a number on any Do Not Call list, and a on tuse an audiated or artificial voice or precorded messages without proper consent. Contact your attempt to ensure your compliance. For more information, review Compliance and Bet Proceeds for Outreach	inclu Not with	ding for bus Call list, and out proper c	iness-to do not u onsent.	use an a Contac	ess calls autodia t your a	and texts ler or artif ttorney to	Never o cial voice ensure y	federal, state or local laws, all or text a number on any Do or prerecorded messages our compliance. ces for Outreach	C	WARNING! You must comply with the TCPA and any other federal, state or local lows, including for business-to-business calls and texts. Never call or text a number on any Do Not Call list, and for usize an andrelation or anticial vision are precorated mesosyst without proper content. Control your attempt to ensure your compliance. For more information, review Complexations and Bast Practices for Qutreach.
Concel	η							cel Confirm		Cancel Confirm

8. Click Confirm once you are ready to start the SmartPlan.



Adding an Individual Contact to a SmartPlan

1. Start by going to your contacts dashboard.

2. Find the contact you want to add to a SmartPlan and open their contact page. Then select SmartPlans on the right-hand side and click Add to SmartPlan.

ck to Contacts	Previous Contact	Next Contact 🕨	Search Contacts
Demo Test Last contact on Never	Ø ···	Timeline Opportunities	SmartPlans Tasks Notes Saved Searches
Contact's Health Score 64% Mark as Lead test NEPA			Hello Malesa! It looks like Demo Test doesn't have any SmartPlans yet. Add to SmartPlan
C +1 234 567 8901	⊠ demotest@gmail.com		
Lead Source Account	 Malesa Clemonts Owner: Malesa Clemonts		
NEIGHBORHOODS Primary ☆			
Add Neighborhood			
ADDITIONAL CONTACT INFO	DRMATION		
Preferred Contact Method			
Email			
Phone			

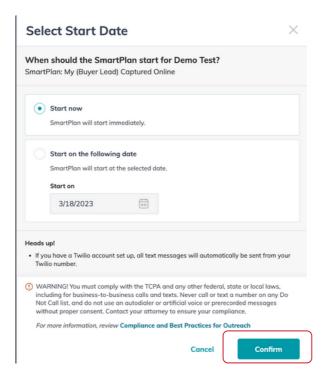
3. You will now see a list of SmartPlans available in your library. Find the SmartPlan you want to add the contact to and click select next to that SmartPlan.





command connect			Ado	l Co	ntact to SmartPlan	×
Back to Contacts	Previous Contact	Next Con			he SmartPlan you want to add the contact to. Jout SmartPlans	
Demo Test	0	Timel	My Sn		ans SmartPlan Name	
Contact's Health Score 64%			+	2	1 Source Lead Follow Up 22 touches [34 steps Select	
test NEPA	⊠ demotest@gmail.com		+	2	My (Buyer Lead) Captur 19 touches 32 steps	
Lead Source			+	2	My (Buyers) Mid-Term N 4 touches 8 steps	
Account	Malesa Clemonts Owner: Malesa Clemonts		•	2	My Bi-Weekly Neighbor Select 1 touches 3 steps	
NEIGHBORHOODS			•	8	1Source Welcome Brand Select 2 touches 3 steps	
Add Neighborhood			•	2	1Source Welcome Exper 2 touches 3 steps	
ADDITIONAL CONTACT INFO	DRMATION					
Preferred Contact Method						
Email						

4. Choose your start date. Then click Confirm.



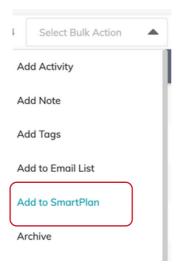


Adding Multiple Contacts from the Contacts Dashboard

1. To add multiple contacts to a SmartPlan from the contacts dashboard, select all of the contacts you want to add. Click the <u>Select Bulk Action</u> drop-down.

Malesa Clemonts's Contac	ts		d Import	🕀 Add Contact	
Q Search 💌	SmartView: A	All Contacts 🗸 📼			
Selected: 4 Select Bulk Action 💌		Customize Columns	i≡ 88 K 4	Show 1-10 of 321	Х
NAME	RECENTLY ACTIVE	LAST CONTACTED	TAGS	PRIM	
Adrian LoDico		Mar 14, 2023 (3 days ago)	KW Pocono Agent	+1 27	• • •
✓ Alec Santiago		Mar 14, 2023 (3 days ago)	KW Pocono Agent	+1 57	
Alex McAteer		Mar 14, 2023 (3 days ago)	KW Scranton Agent	+1 97	• • •
Alexandra (Alex) Vlamis-Margoli		Mar 14, 2023 (3 days ago)	KW Pocono Agent	+1 57	•••
		Mar 14. 2023			

2. Select Add to SmartPlan from the drop-down menu.





3. Find the SmartPlan you want to add the contacts to. Click Select.

	sa Clemonts's Contact						he SmartPlan you want to add select out SmartPlans	ed contacts to.
ຊ	Search 🔻 🗟	Filters	SmartView	r: All Contacts 🗸	My Sm	nartPla	ins	
Select	ed: 4 Select Bulk Action 👻			Customize (Q :	Search	SmartPlan Name	
	NAME Adrian LoDico	RECENTLY	ACTIVE	LAST CONTA	•	8	1 Source Lead Follow Up 22 touches 34 steps	Select
 Image: A start of the start of	Alec Santiago			(3 days ago) Mar 14, 2023 (3 days ago)	•	8	My (Buyer Lead) Captur	Select
~	Alex McAteer			Mar 14, 2023 (3 days ago)			My (Buyers) Mid-Term N	
~	Alexandra (Alex) Vlamis-Margol			Mar 14, 2023 (3 days ago)	^		4 touches 8 steps	Select
	Alfredo Roman Ali Cabrera			Mar 14, 2023 (3 days ago) Mar 14, 2023	+	8	My Bi-Weekly Neighbor 1 touches 3 steps	Select
	Ali Cabrera Alicja Klein			(3 days ago) Mar 14, 2023 (3 days ago)	•		1Source Welcome Brand 2 touches [3 steps	Select
	Alison Pisano			Mar 14, 2023 (3 days ago)		a	1Source Welcome Exper	
	Alyssa Tranchina			Mar 14, 2023 (3 days ago)	,	B	2 touches 3 steps	Select
	Amanda Kowalczyk			Mar 14, 2023 (3 days ago)				

4. Choose your start date then click Confirm.

Sele	ect Start Date ×
	should the SmartPlan start? Plan: My (Buyer Lead) Captured Online
	contacts (4)
	Start all now
J	Start dii now SmartPlans will start immediately.
	Start all on the following date
	SmartPlans will start at the selected date.
	Start on
	3/18/2023
	Stagger start over the next few days
	Staggering allows you to distribute when the SmartPlan starts for a large group of people. You can choose to start the SmartPlan for X amount of people per business day until all are added to the SmartPlan.
ieads u	spf
	u have a Twilio account set up, all text messages will automatically be sent from your io number.
inclu Not	RNING! You must comply with the TCPA and any other federal, state or local laws, ding for business-to-business calls and texts. Never call or text a number on any Do Call list, and do not use an autodialer or artificial voice or prerecorded messages out proper consent. Contact your attorney to ensure your compliance.
For	more information, review Compliance and Best Practices for Outreach
	Cancel