Command Quick Guides

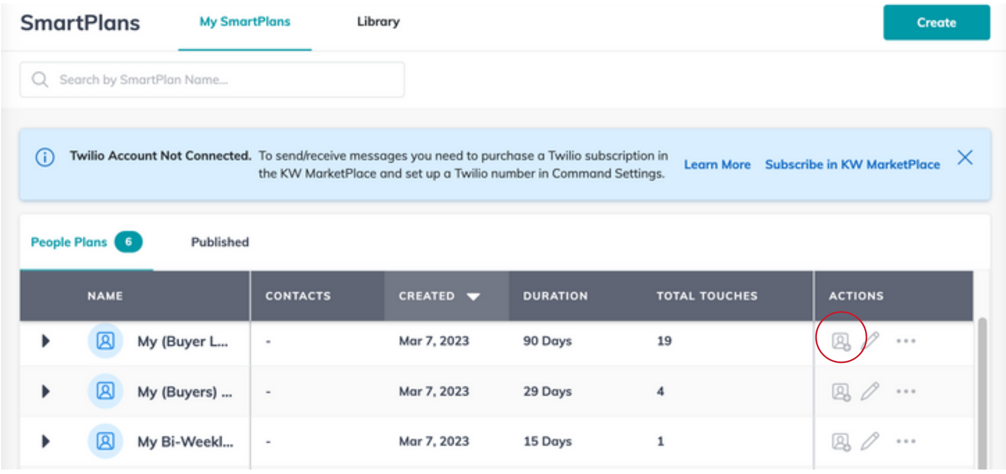
Your Guide to Command: Adding Contacts to SmartPlans

Adding Contacts to SmartPlans

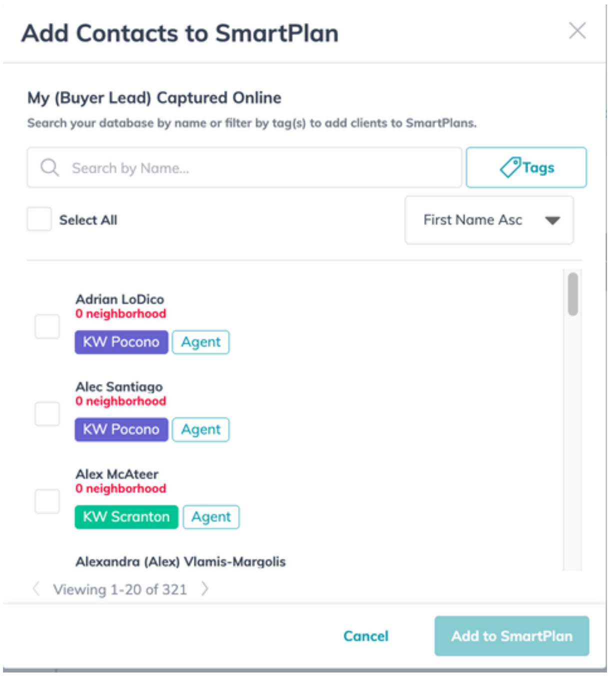
1. Log in to https://agent.kw.com with your Keller Williams login credentials.

2. Click on the SmartPlans Icon on the left-side panel.

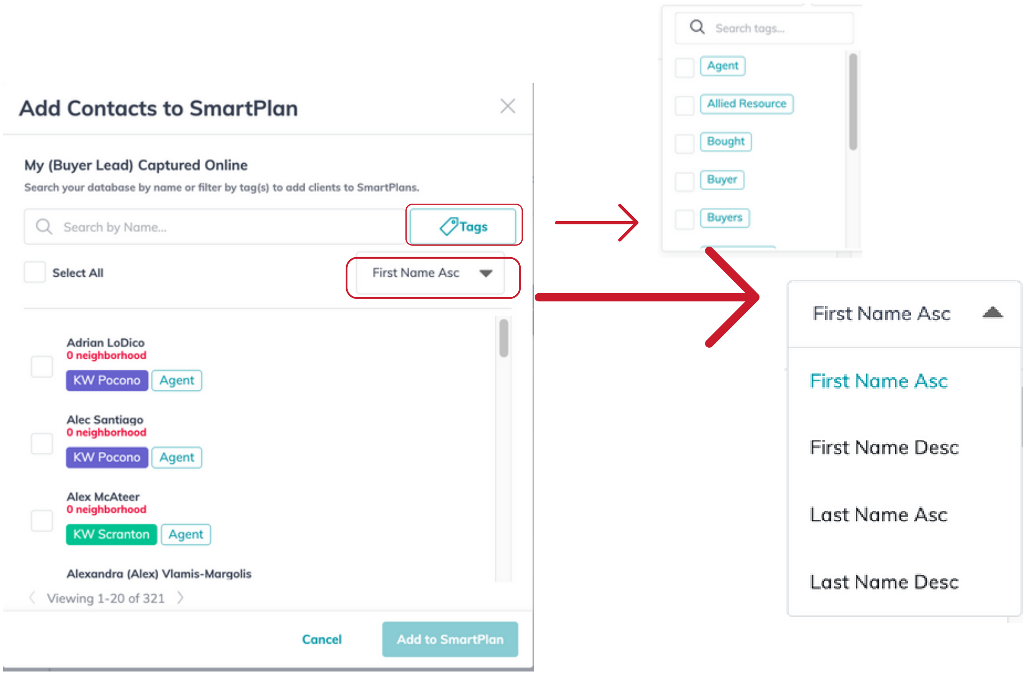
3. Click the Add Contacts Icon next to the SmartPlan you want to use.



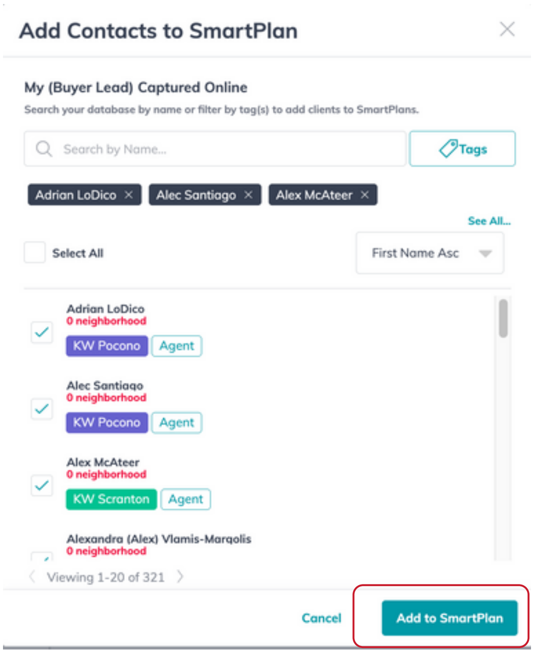
4. A pop-up will appear with a list of your contacts. Check the names of the contacts you wish to add to the SmartPlan.



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



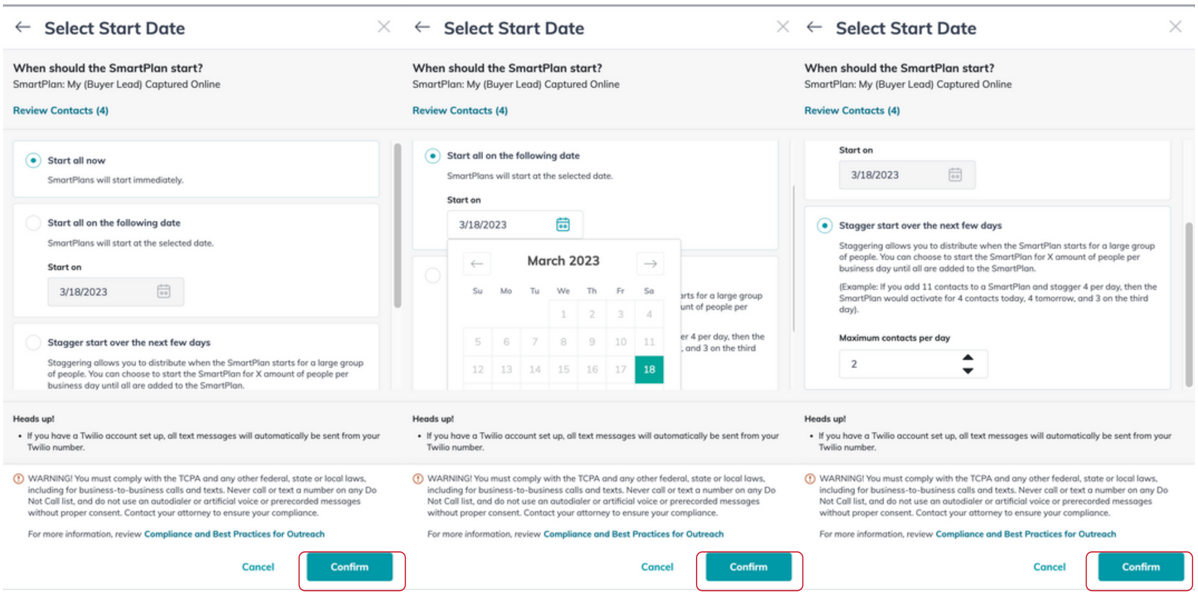
6. Once you select the contacts you want to add, click Add to SmartPlan.



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

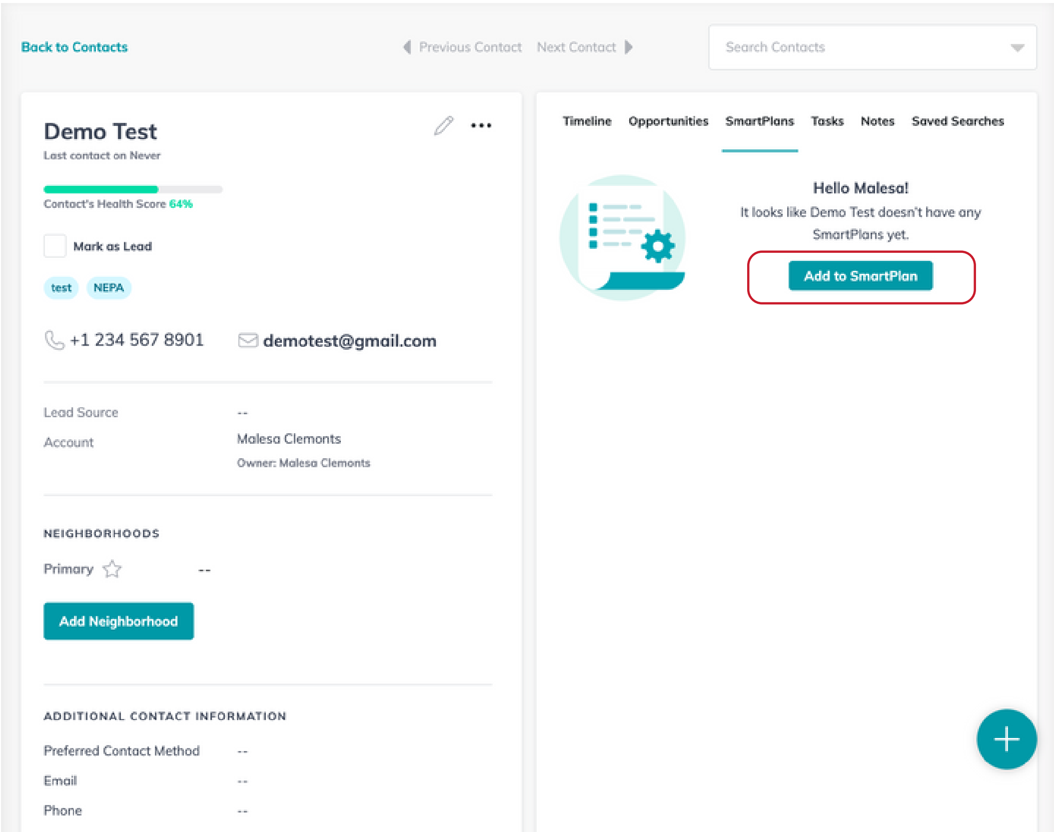


8. Click Confirm once you are ready to start the SmartPlan.

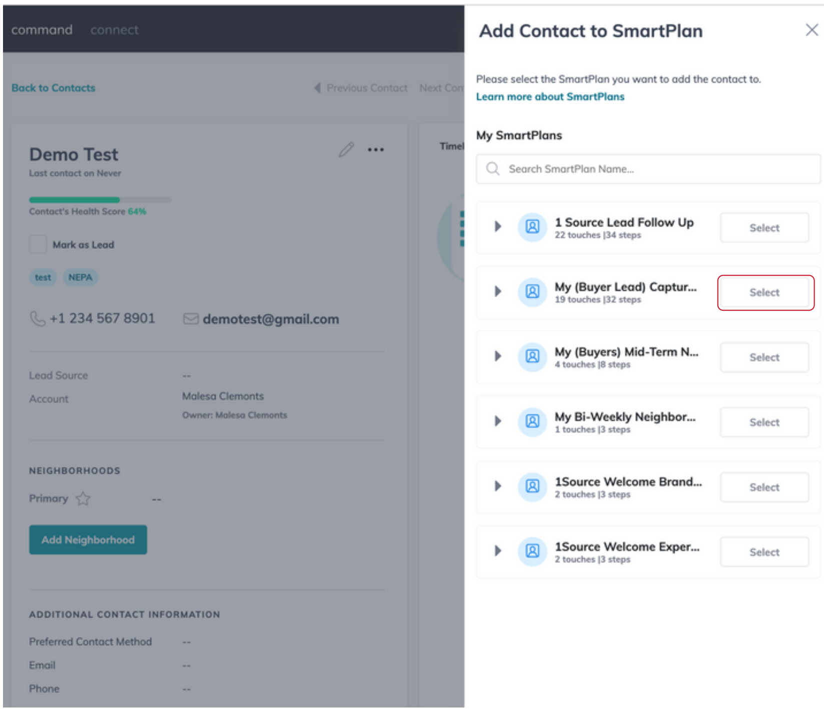
Adding an Individual Contact to a SmartPlan

1. Start by going to your contacts dashboard.

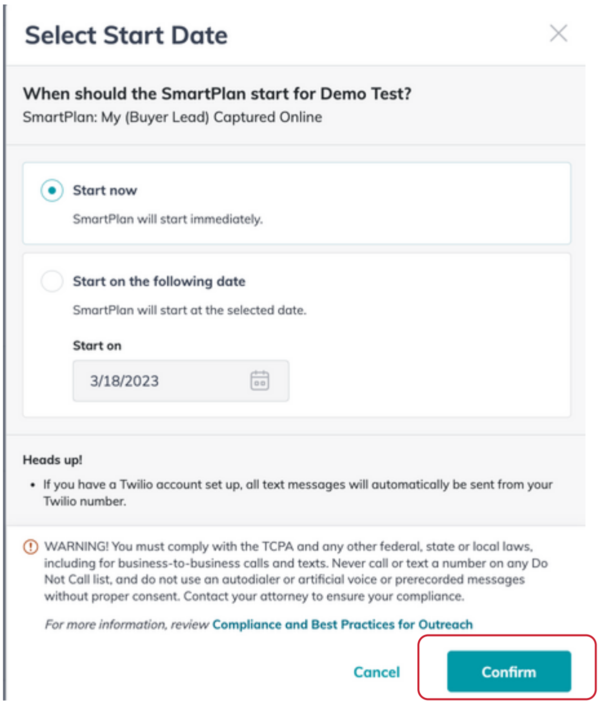
2. Find the contact you want to add to a SmartPlan and open their contact page. Then select SmartPlans on the right-hand side and click Add to SmartPlan.



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.

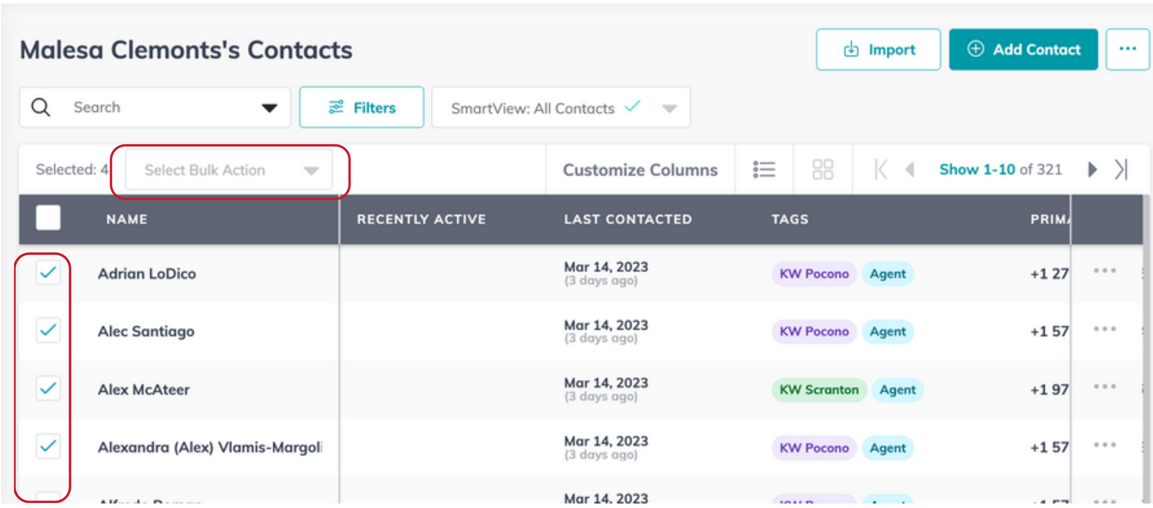


4. Choose your start date. Then click Confirm.

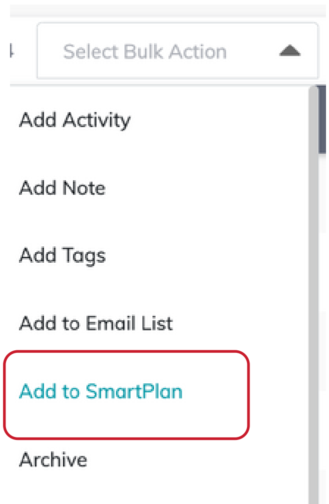


Adding Multiple Contacts from the Contacts Dashboard

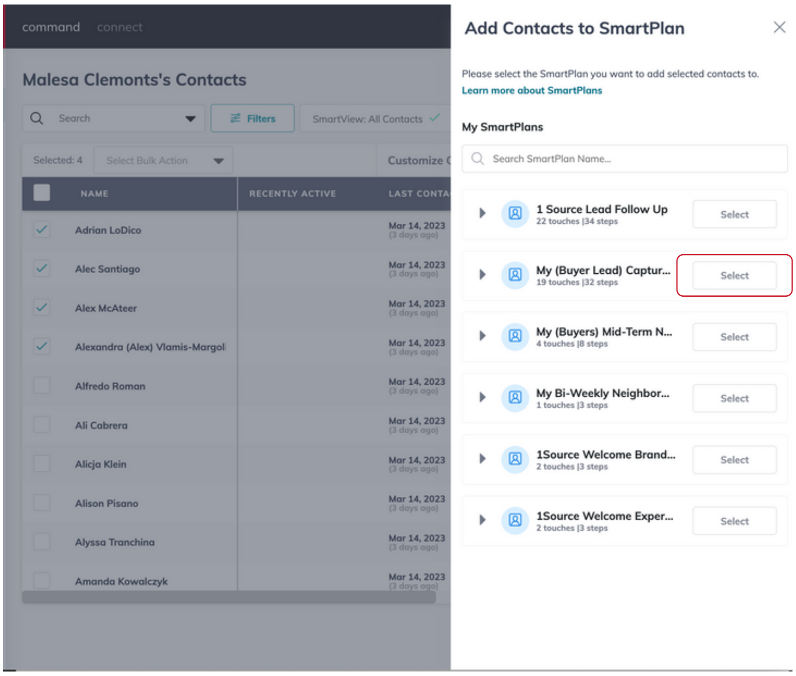
1. To add multiple contacts to a SmartPlan from the contacts dashboard, select all of the contacts you want to add. Click the Select Bulk Action drop-down.



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



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



4. Choose your start date then click Confirm.