





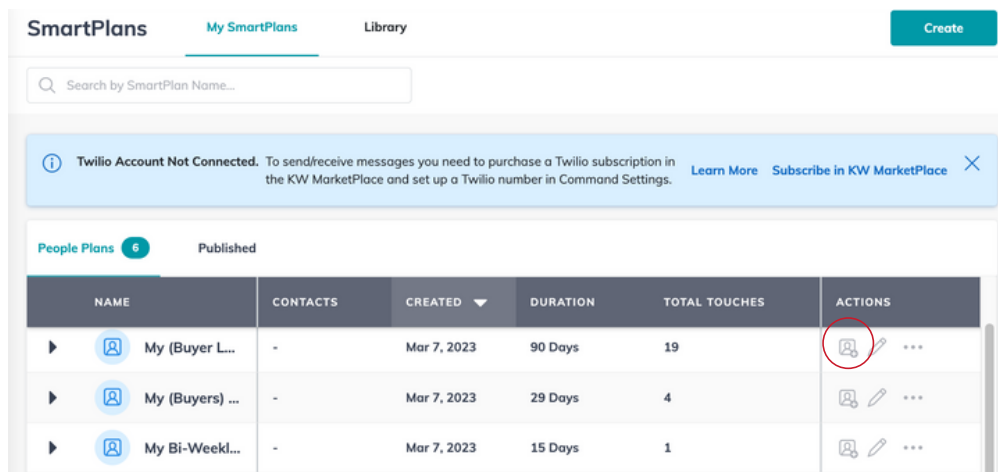
Command Quick Guides

**Your Guide to Command:
Adding Contacts to SmartPlans**

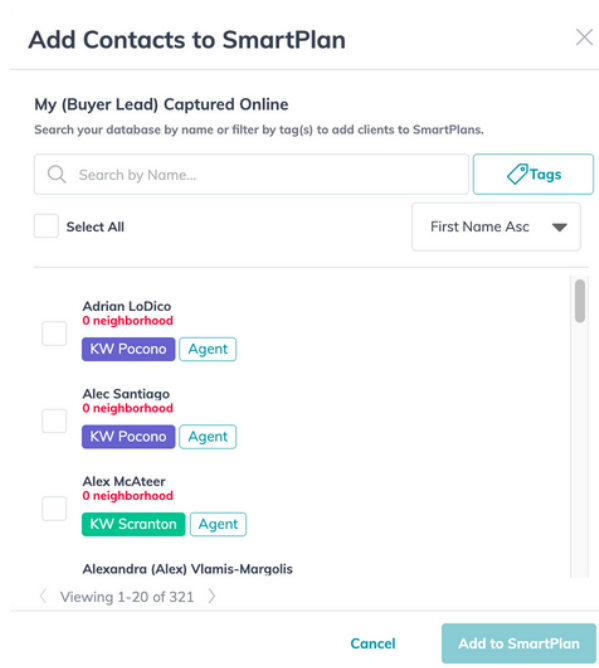


Adding Contacts to SmartPlans

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.

The screenshot shows the 'Add Contacts to SmartPlan' interface. At the top, there's a search bar labeled 'Search by Name...' and a 'Tags' button. Below the search bar, there's a 'Select All' checkbox and a dropdown menu currently set to 'First Name Asc'. The main area displays a list of contacts: Adrian LoDico (KW Pocono, Agent), Alec Santiago (KW Pocono, Agent), Alex McAteer (KW Scranton, Agent), and Alexandra (Alex) Vlamis-Margolis. To the right, a 'Search tags...' dropdown is open, showing a list of tags: Agent, Allied Resource, Bought, Buyer, and Buyers. Below that, a sorting dropdown is open, showing options: First Name Asc, First Name Desc, Last Name Asc, and Last Name Desc. Red arrows point from the 'Tags' button to the tag list, and from the 'First Name Asc' dropdown to the sorting dropdown.

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

The screenshot shows the 'Add Contacts to SmartPlan' interface after selecting contacts. The search bar is empty, and the 'Tags' button is visible. Below the search bar, there are three selected contact tags: Adrian LoDico, Alec Santiago, and Alex McAteer. The 'Select All' checkbox is checked, and the dropdown menu is still set to 'First Name Asc'. The main area displays the list of contacts with checkmarks next to the first three: Adrian LoDico (KW Pocono, Agent), Alec Santiago (KW Pocono, Agent), and Alex McAteer (KW Scranton, Agent). The 'Add to SmartPlan' button at the bottom right is highlighted with a red box.



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 × ← Select Start Date × ← Select Start Date ×

When should the SmartPlan start?
SmartPlan: My (Buyer Lead) Captured Online
Review Contacts (4)

Start all 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.
Maximum contacts per day
2

Heads up!
• If you have a Twilio account set up, all text messages will automatically be sent from your Twilio number.

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for business-to-business calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.
For more information, review [Compliance and Best Practices for Outreach](#)

Cancel Confirm

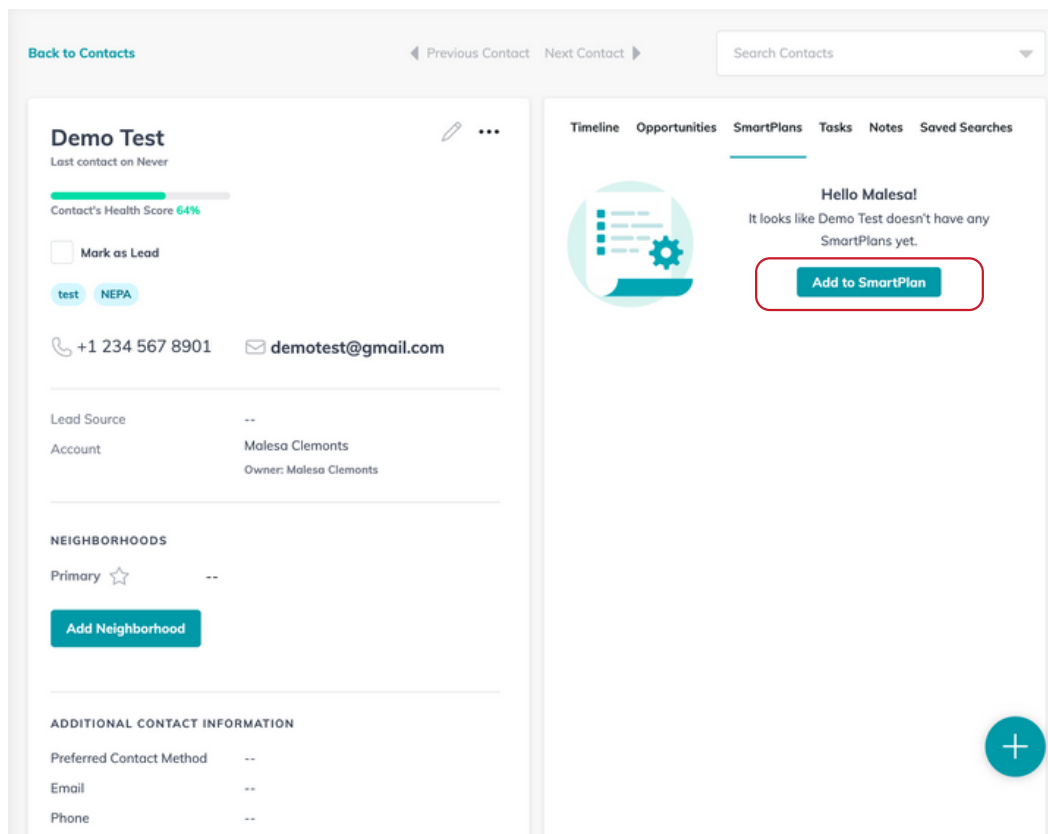
8. Click **Confirm** once you are ready to start the SmartPlan.



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](#).



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.



The screenshot shows a 'command connect' interface. On the left, a contact profile for 'Demo Test' is visible, including a health score of 64%, a phone number (+1 234 567 8901), and an email address (demotest@gmail.com). On the right, a modal window titled 'Add Contact to SmartPlan' is open. It prompts the user to select a SmartPlan from a list. The list includes several options, with 'My (Buyer Lead) Captur...' selected and highlighted with a red border. Other options include '1 Source Lead Follow Up', 'My (Buyers) Mid-Term N...', 'My Bi-Weekly Neighbor...', '1Source Welcome Brand...', and '1Source Welcome Exper...'.

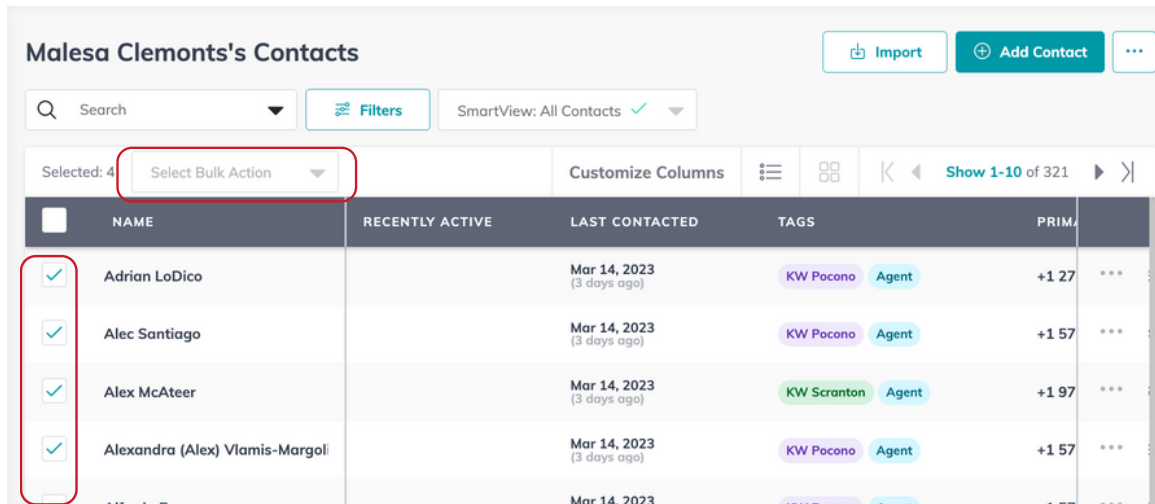
4. Choose your start date. Then click **Confirm**.

The screenshot shows a 'Select Start Date' modal window. The title is 'Select Start Date' and the subtitle is 'When should the SmartPlan start for Demo Test?'. The SmartPlan selected is 'My (Buyer Lead) Captured Online'. There are two radio button options: 'Start now' (selected) and 'Start on the following date'. The 'Start on the following date' option has a date picker set to '3/18/2023'. Below the options, there is a 'Heads up!' section with a warning icon and text: 'If you have a Twilio account set up, all text messages will automatically be sent from your Twilio number.' At the bottom, there is a 'WARNING!' section with a warning icon and text: 'You must comply with the TCPA and any other federal, state or local laws, including for business-to-business calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.' At the bottom right, there are two buttons: 'Cancel' and 'Confirm' (highlighted with a red border).

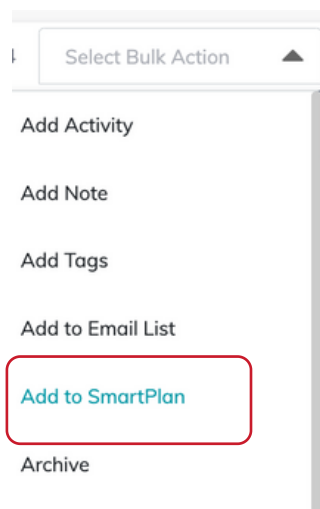


Adding Multiple Contacts from the Contacts Dashboard

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**.

The screenshot shows a 'command connect' interface. On the left, a panel titled 'Malesa Clemonts's Contacts' displays a list of contacts with columns for 'NAME', 'RECENTLY ACTIVE', and 'LAST CONTACTED'. Four contacts are selected, indicated by checkmarks in the first column. On the right, a modal window titled 'Add Contacts to SmartPlan' is open. It prompts the user to 'Please select the SmartPlan you want to add selected contacts to.' Below this, there is a search bar and a list of SmartPlans. The SmartPlan 'My (Buyer Lead) Captur...' is highlighted with a red box around its 'Select' button.

4. Choose your start date then click **Confirm**.

The screenshot shows a 'Select Start Date' modal window. It asks 'When should the SmartPlan start?' for the SmartPlan 'My (Buyer Lead) Captured Online'. There are three options: 'Start all now' (selected), 'Start all on the following date', and 'Stagger start over the next few days'. The 'Start all on the following date' option has a date picker set to '3/18/2023'. Below the options, there is a 'Heads up!' section with a warning icon and text: 'WARNING! You must comply with the TCPA and any other federal, state or local laws, including for business-to-business calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.' At the bottom, there are 'Cancel' and 'Confirm' buttons, with the 'Confirm' button highlighted by a red box.