




Command Quick Guides


**Your Guide to Command:
Client Updates**

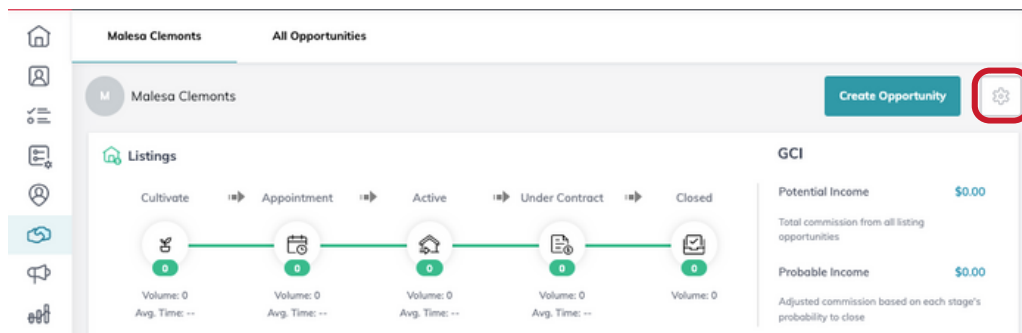


Access

1. Login to <https://agent.kw.com> using your Keller Williams login.
2. Click the **Opportunities Icon**, , on the left-side panel.

Set Your Default Daily Email Preferences

1. Click the **Gear Icon**, , in the top right corner of the Opportunities Dashboard.



2. Choose the time of day you want client update emails sent. These emails will be sent once per day, as long as a checklist item was completed for that day.



Opportunities Client Update / Malesa Clemonts (personal)

Create template settings that will be available on opportunities.
These settings can be overridden individually on an opportunity.

Important steps in an Opportunity

- 1.) In an individual opportunity, click on the Client Updates button in the top right to manage emails for that specific opportunity.
- 2.) Click the switch to activate the client emails.
- 3.) Any Client Update changes in the opportunity will override the settings below.

[Detailed Instructions](#)

Time zone based on America/New_York

Send at: 10 : 30 AM PM

Send from: Owner

Select the Marketing Profile you wish to send emails from. Marketing Profiles can be set up here

Send to: Client and Co-Client
 Primary Client Only

Also send to: Owner

You're currently using the default email template [Preview](#)

3. Choose who you want to send updates to.

- **Client and Co-Client:** updates will send to both the primary contact and the co-buyer/co-seller linked to an Opportunity.
- **Primary Client Only:** updates will only send to the primary contact linked to an Opportunity



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4. Check the **Owner** box in the 'Also Send To' section, if you would like to receive a copy of the email updates.

Send to: Client and Co-Client Primary Client Only

Also send to: Owner

You're currently using the default email template [Preview](#)

6. Click **Save Changes** when you are done.

Also send to: Owner

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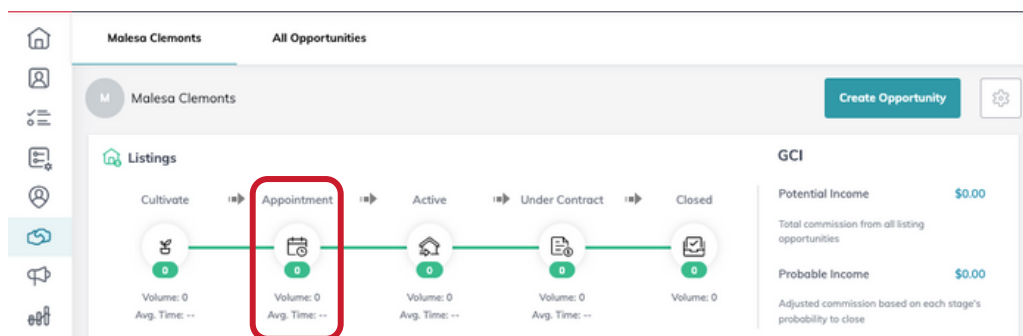
[Cancel Changes](#) [Save Changes](#)



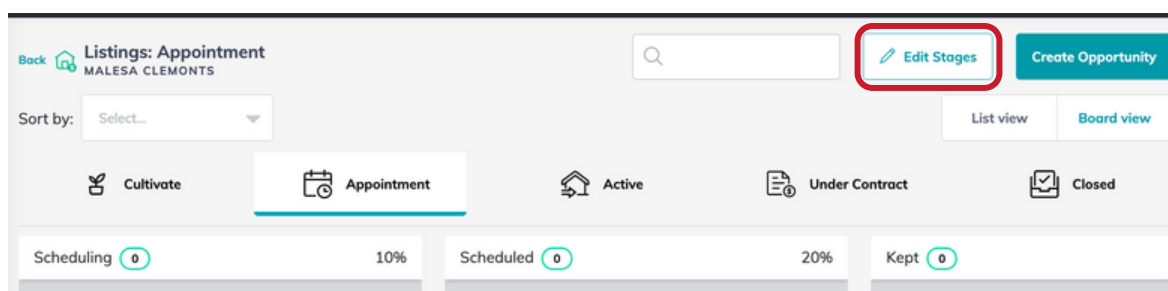
Select Default Opportunity Checklist Items to Include

Once you choose the default checklist items to include in client updates, all of the items will be sent in updates, for every Opportunity.

1. Go to the Opportunities dashboard and click on the phase to which you want to add a checklist.



2. Click **Edit Stages** at the top of the page.



3. Click the **checklist icon**, , next to the stage you want to edit.



Back to Listings: Appointment
Edit Appointment Stages + Add Stage

ORDER	STAGE NAME	PROBABILITY	CHECKLIST	CLIENT UPDATES
1	Scheduling	10%	0/0 items	0
2	Scheduled	20%	0/0 items	0
3	Kept	30%	0/0 items	0
4	Post-Appointment Follow Up	30%	0/0 items	0

4. Click the **Client Update checkbox**, if you want to include these items in client update emails once they are completed.

Checklist: Appointment-Post-Appointment Follow Up ×

Type: Listing Phase: Appointment Stage: Post-Appointment Follow Up Total Items: 5

	<input type="checkbox"/> Thank you & Next Steps Email	<input checked="" type="checkbox"/> Client Update
	<input type="checkbox"/> Seller Sign Listing Documents	<input checked="" type="checkbox"/> Client Update
	<input type="checkbox"/> Schedule Photos	<input checked="" type="checkbox"/> Client Update
	<input type="checkbox"/> For Sale Sign Ready	<input type="checkbox"/> Client Update
	<input type="checkbox"/> Update Opportunity Phase	<input type="checkbox"/> Client Update

+ Add item

Cancel Save



5. Once you have selected all of the items you want to include in client updates, click **Save**.

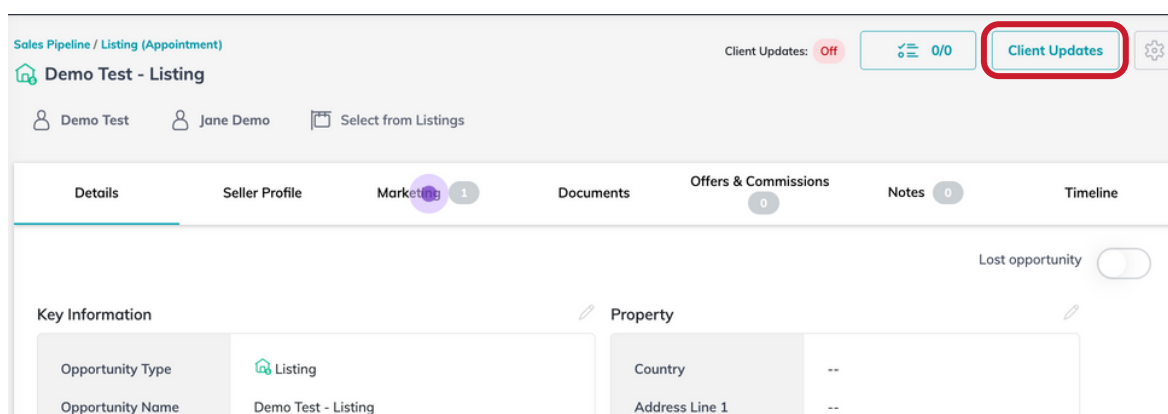
6. Repeat the above steps for every stage in your Opportunity pipeline.

Edit the Client Update Preferences for a Specific Opportunity

Once your defaults are set, you may want or need to change your preferences for a specific opportunity.

1. Find and click on the Opportunity that you want to edit the email preferences for.

2. Click **Client Updates** in the top corner.



3. Use the **toggle** at the top of the page to turn off client update emails for this specific opportunity.

Client Updates Settings: Demo Test - Listing ✕

i Selections made here will override your default settings for this opportunity

Send daily progress emails for this opportunity

Time zone based on America/New_York

Send at: AM PM

4. Edit the Opportunity's daily email preferences.

- Click the up and down arrows to change the time that email updates send, select AM or PM.
- Click the checkbox next to the client or co-client's name to remove them from updates

Client Updates Settings: Demo Test - Listing ✕

i Selections made here will override your default settings for this opportunity

Send daily progress emails for this opportunity

Time zone based on America/New_York

Send at: AM PM

Send from:

Select the Marketing Profile you wish to send emails from.
Marketing Profiles can be set up here

Send to:

<input checked="" type="checkbox"/> Demo Test	Seller	<input type="text" value="demotest@gmail.com"/>
<input checked="" type="checkbox"/> Jane Demo	Co-Seller	<input type="text" value="jane.demo@gmail.com"/>
<input checked="" type="checkbox"/> Malesa Clemonts	Assignee	<input type="text" value="malesa@1sourcecs.com"/>

[+ Add Contact](#)

You're currently using the default email template [Preview](#)

[Learn more about Client Updates](#)

Cancel Changes

Save Changes

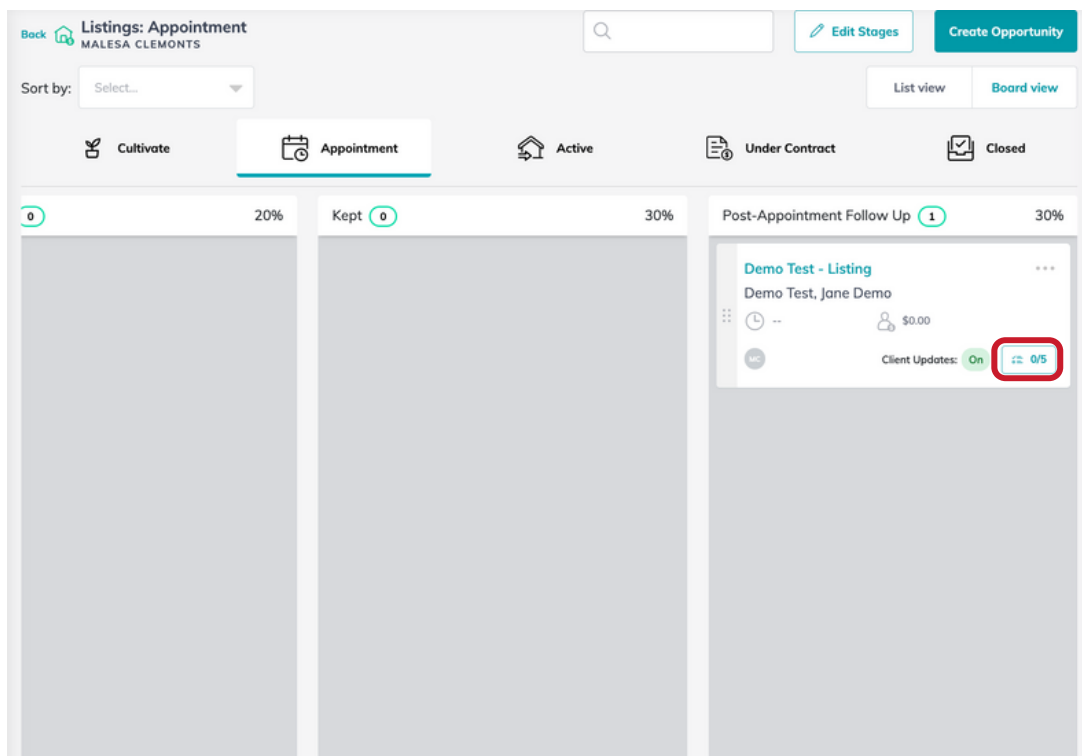


5. Click **Save** once you are finished editing your preferences.

Add One-off Opportunity Checklist Items to Include

From time to time, you may need to include or exclude checklist items for a specific Opportunity. These one-off items can also be included in client updates.

1. Find the Opportunity in the pipeline and click the checklist icon  .





2. Click the client update check box next to an item to add or remove it from update emails. Hover over the checklist item to add a due date to the task. These changes will save automatically.

Checklist: Demo Test - Listing ✕

[Kept](#) **Post-Appointment Follow Up** [Staging](#)
APPOINTMENT APPOINTMENT ACTIVE

Client Updates: On 0/5 Hide Completed Items

<input type="checkbox"/>	Thank you & Next Steps Email	<input checked="" type="checkbox"/> Client Update
<input type="checkbox"/>	Seller Sign Listing Documents	<input checked="" type="checkbox"/> Client Update
<input type="checkbox"/>	Schedule Photos	<input checked="" type="checkbox"/> Client Update
<input type="checkbox"/>	For Sale Sign Ready	<input type="checkbox"/> Client Update

[View Opportunity Details](#) [Close](#)