COMMAND CENTRAL

Command Quick Guides

Your Guide to Command: Client Updates

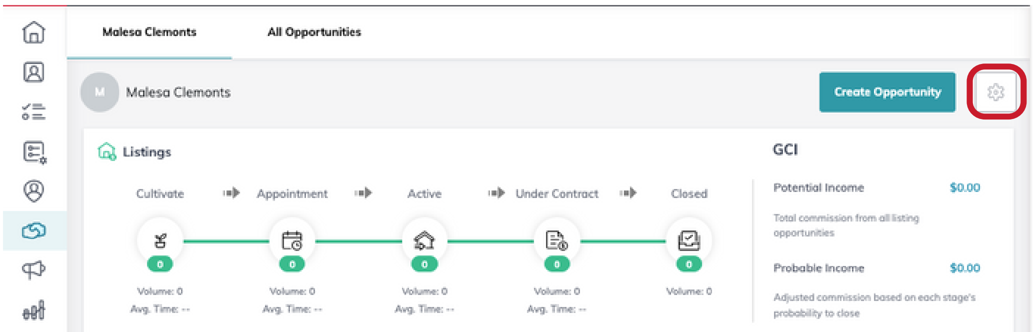
Access

1. Login to **https://agent.kw.com** using your Keller Williams login.

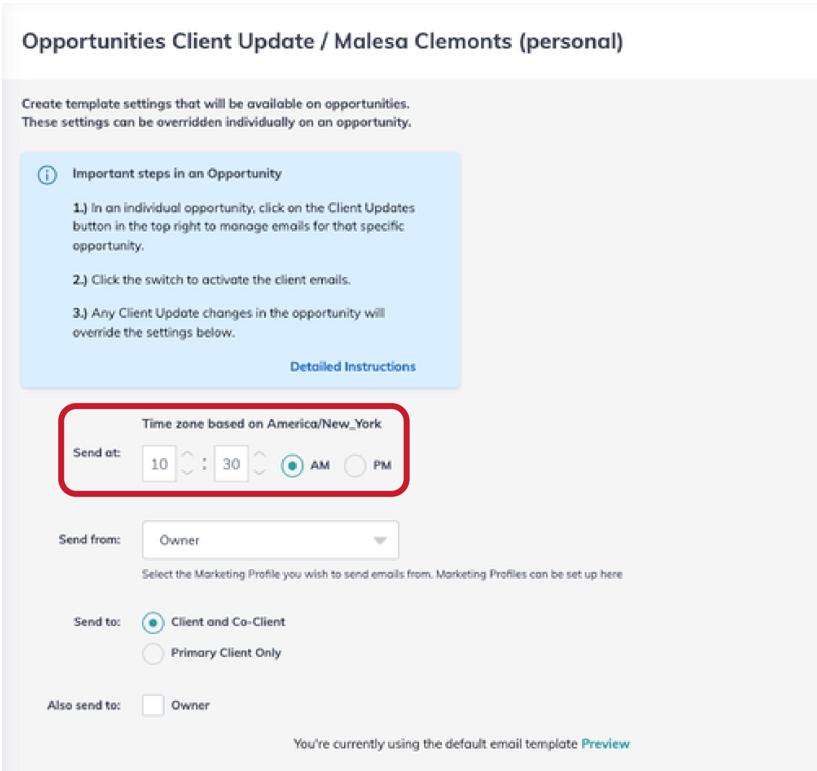
2. Click the **Opportunities Icon**, , on the left-side panel.

Set Your Default Daily Email Preferences

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

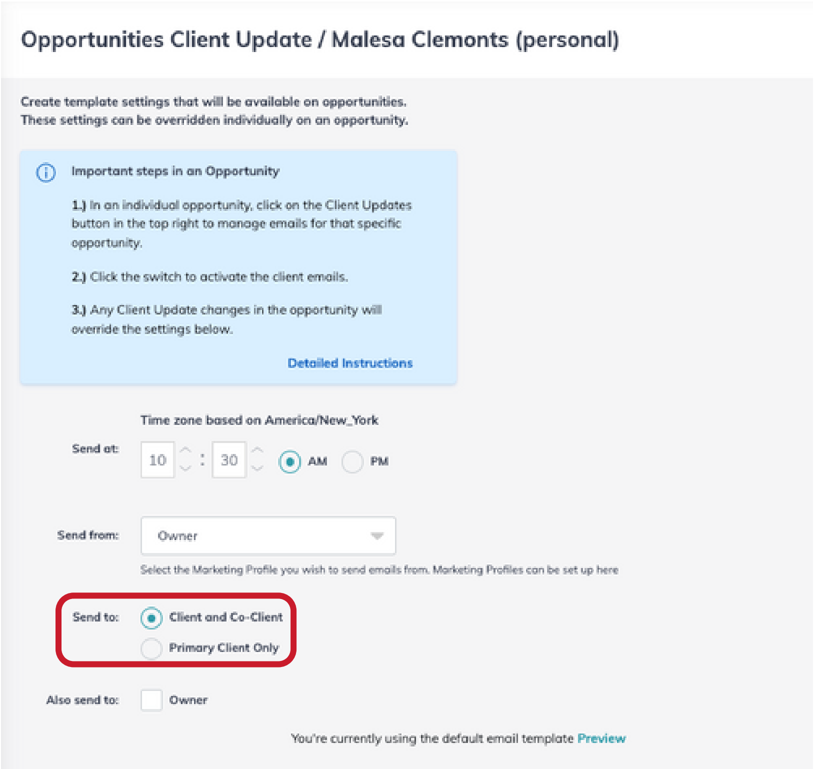


2. Choose the time of day you want client update emails sent. These emails will be sent once per day, as long as a checklist item was completed for that day.

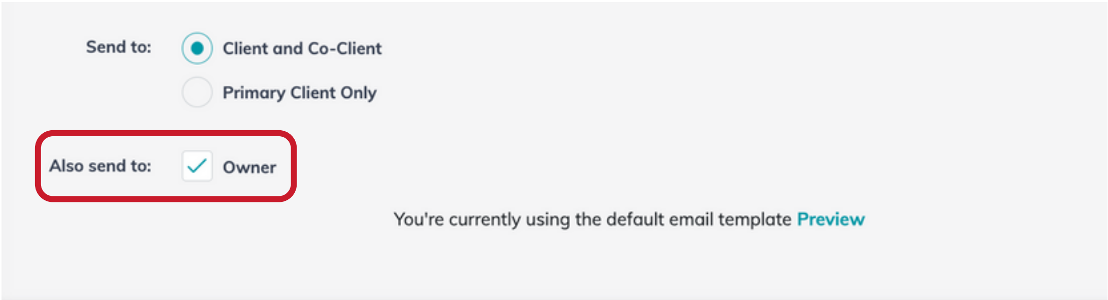


3. Choose who you want to send updates to.

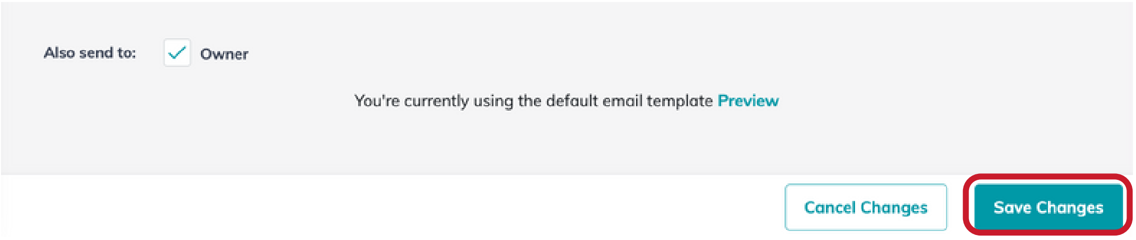
- **Client and Co-Client**: updates will send to both the primary contact and the co-buyer/co-seller linked to an Opportunity.
- **Primary Client Only**: updates will only send to the primary contact linked to an Opportunity



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



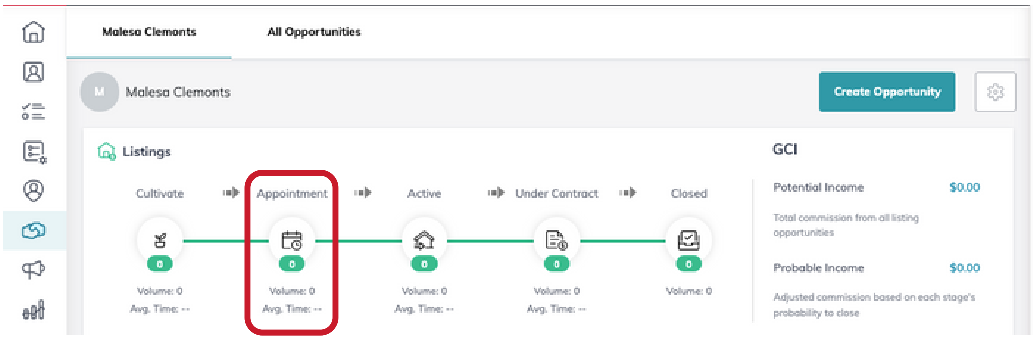
6. Click **Save Changes** when you are done.



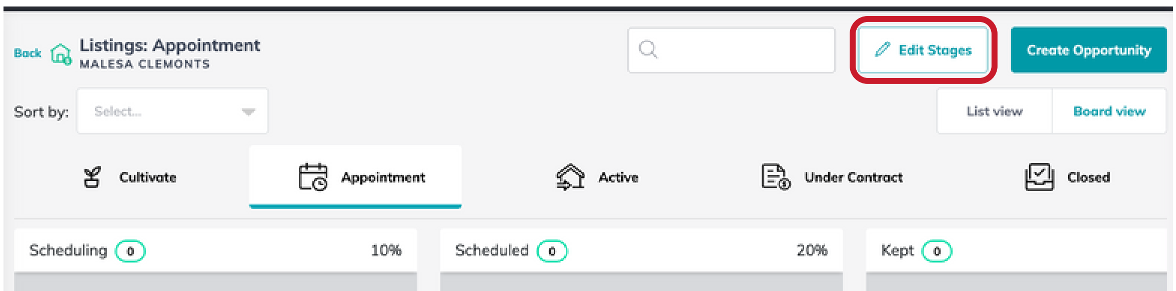
Select Default Opportunity Checklist Items to Include

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

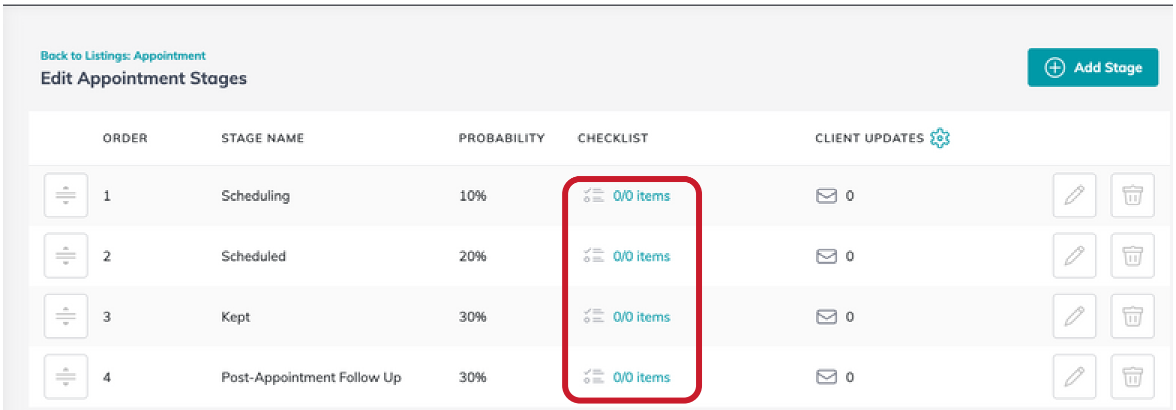
1. Go to the Opportunities dashboard and click on the phase to which you want to add a checklist.



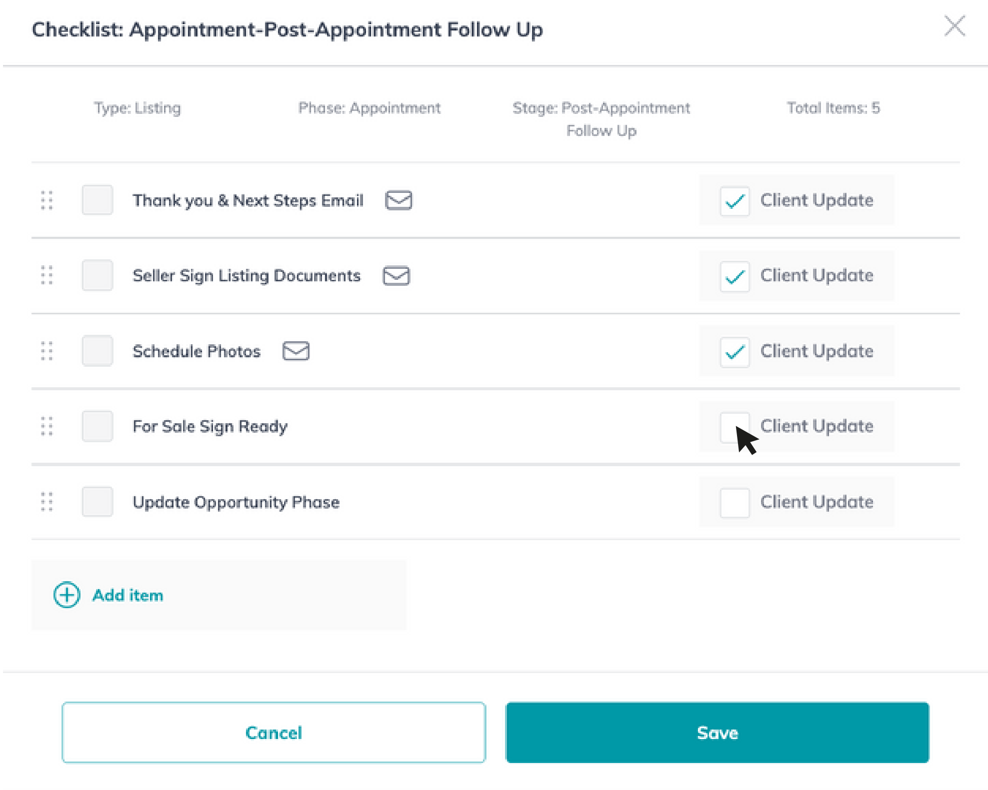
2. Click **Edit Stages** at the top of the page.



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



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



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

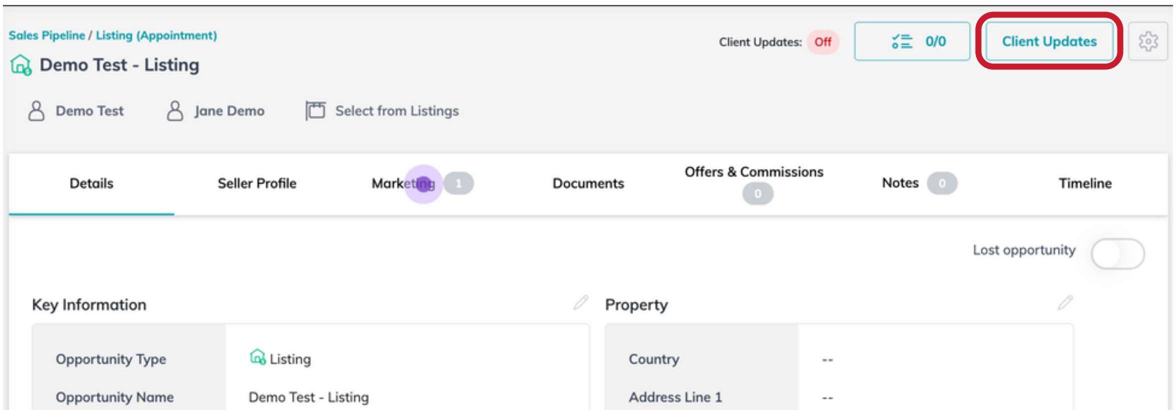
6. Repeat the above steps for every stage in your Opportunity pipeline.

Edit the Client Update Preferences for a Specific Opportunity

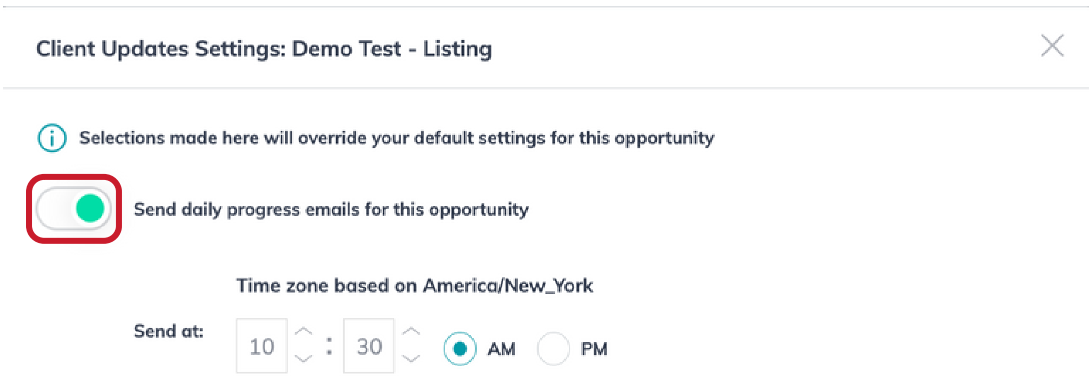
Once your defaults are set, you may want or need to change your preferences for a specific opportunity.

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

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

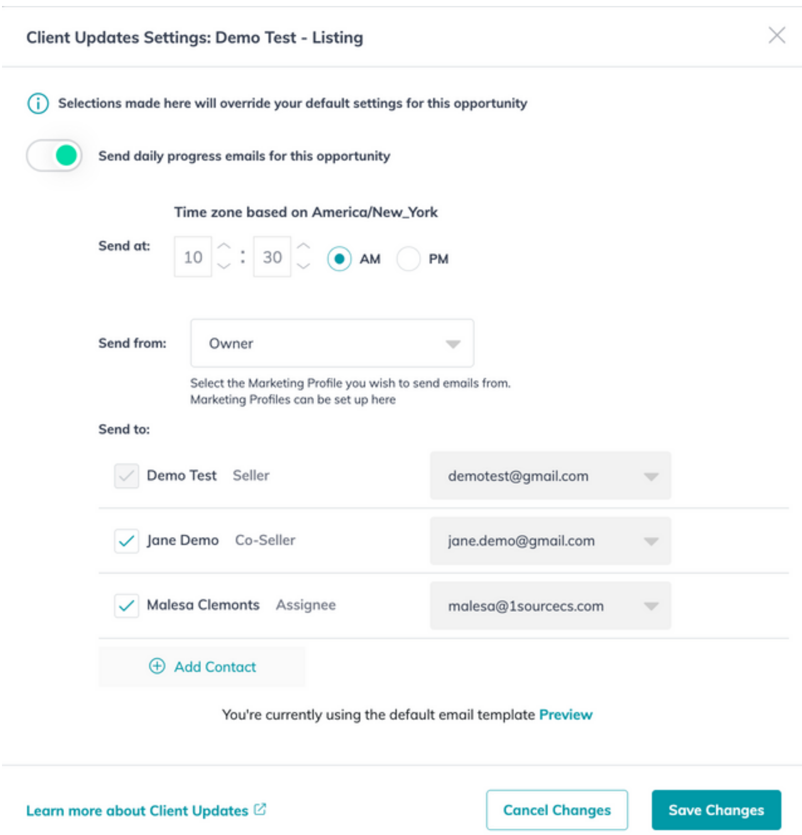


3. Use the **toggle** at the top of the page to turn off client update emails for this specific opportunity.



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

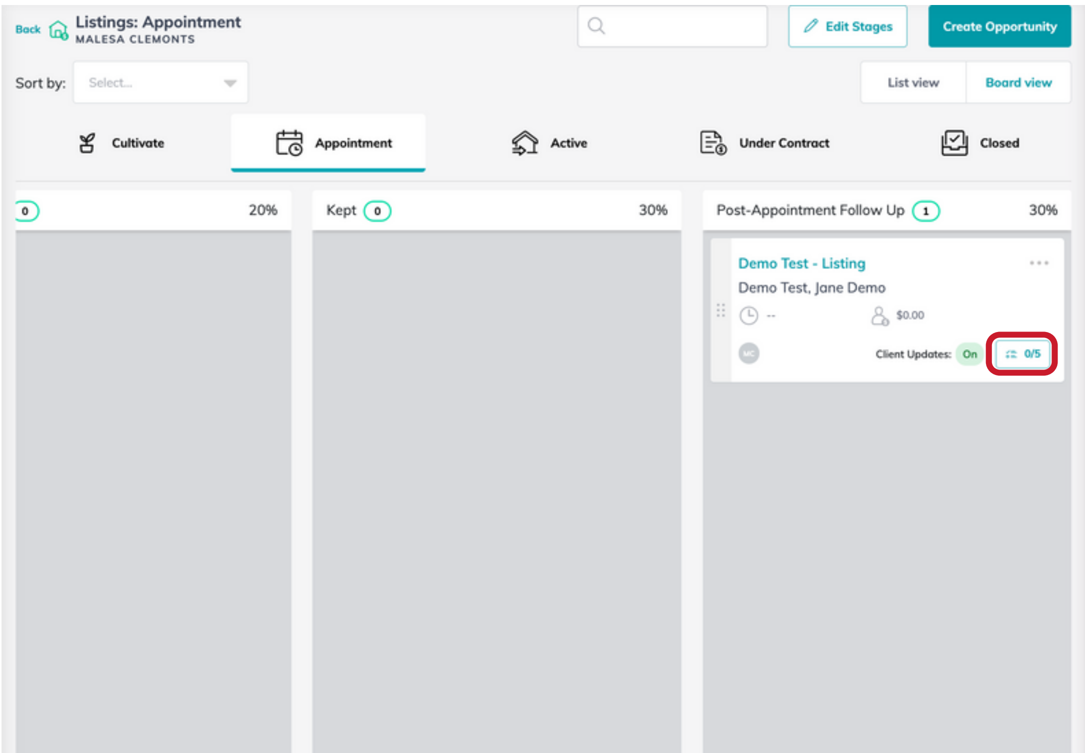


5. Click **Save** once you are finished editing your preferences.

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.