





Command Quick Guides

Your Guide to Command:
*Add Contacts to
Smartplan*



- 1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
- 2. Click the **SmartPlans icon**, , on the left side of the home page.
- 3. Click the Add Contacts icon, , to the right of the SmartPlan in question.

SmartPlans

My SmartPlans

















Library

Create

Search by SmartPlan Name...

People Plans 9

Published

NAME	CONTACTS	CREATED	DURATION	TOTAL TOUCHES	ACTIONS
<div>▶</div> <div> My 5-5-5</div>	-	May 20, 2021	90 Days	4	<div>  </div>
<div>▶</div> <div> My Promote My App</div>	-	Apr 26, 2021	5 Days	3	<div>  </div>
<div>▶</div> <div> My 8x8 New Contact ...</div>	-	Apr 19, 2021	51 Days	7	<div>  </div>
<div>▶</div> <div> My Open House Follo...</div>	-	Nov 25, 2020	20 Days	7	<div>  </div>



You can also add contacts to a SmartPlan through the Contacts applet, using bulk actions, and skip to step 6 below:

- 1. From the database view in the Contacts applet, check the box next to the contacts you want to add.
- 2. Click **Add to SmartPlan**, at the bottom of the page.
- 3. Click **Select** next to the SmartPlan you want to add them to.

Jessica Campbell's Contacts

...

Import Contacts

Create Contact

Search...

All

Filters

SmartView: All Contacts

Save Changes

	FULL NAME	PRIMARY EMAIL	PRIMARY PHO...	TAGS	PRIMA	
<input checked="" type="checkbox"/>	Aaron Andrews	aaron.andrews2837363@gmail.com	+1 512 354 6658	A & W Round Rock West	2354 V	...
<input checked="" type="checkbox"/>	Aaron Miller	aaron.miller34334@myemail.com	+1 210 555 0162	M & X Round Rock West	1876 V	...
<input type="checkbox"/>	Aaron Wetzel	wetzelaaron09@myemail.com	+1 806 680 4121	A & W Round Rock West	1708 B	...
<input type="checkbox"/>	Allison Roberts	allison.roberts27371@myemail.com	+1 512 364 6485	N & R 1130 Quail Creek Dr		...
<input type="checkbox"/>	Ashley Johnson	ashley.johnson2334445@myemail.c	+1 512 678 9654	Austin Buyers T & J 1130		...

2 ITEMS SELECTED

☒ Select All

☐ Clear Selection

Add Tag

Add to SmartPlan

Add Note

Send Email

Archive

More Options

1

Go To:

Show 1 - 199

of 199



4. A list of your contacts will appear in the pop-up. Check the box next to the name of the contacts you want to add to the SmartPlan.
- The list of contacts in the pop-up box will only display 20 contacts at a time. At the bottom of the list, use the left and right arrows to navigate through the contacts, in the list. You can select contacts, move to another page of contacts and select more, to add to the SmartPlan.

Add Clients to SmartPlan

My Long-Term Nurture

Search your database by name or filter by tag(s) to add clients to SmartPlans.

Q

Search By Name

Tags

☐ Select All

First Name As

☐ Aaron Miller 21 neighborhoods

SphereGolferSOIBuyer

☐ Abigail Graves 7 neighborhoods

F & GLuxuryAustin BuyersSOI

☐ Aby Cies 3 neighborhoods

C & KAustin BuyersSOI

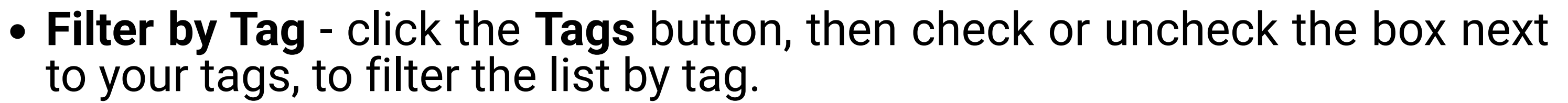
☐ Adam Steele 2 neighborhoods

S & UAustin Buyers

< Viewing 1-20 of 2637 >

Cancel

Add to SmartPlan



Cancel

Add to SmartPlan



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

Add Clients to SmartPlan

My Long-Term Nurture

Search your database by name or filter by tag(s) to add clients to SmartPlans.

Search By Name

Tags

Aaron Miller

Abigail Graves

Adam Steele

Aby Cies

+16 item

☒ Select All

First Name As

☒

Aaron Miller
21 neighborhoods

Sphere

Golfer

SOI

Buyer

☒

Abigail Graves
7 neighborhoods

F & G

Luxury

Austin Buyers

SOI

☒

Aby Cies
3 neighborhoods

C & K

Austin Buyers

SOI

☒

Adam Steele
2 neighborhoods

< Viewing 1-20 of 2637 >

Cancel

Add to SmartPlan



6. If any of the contacts you are adding are [missing key pieces of information](#), you will see a pop-up that shows who they are and what info they are missing. These issues include things like missing a phone number (if there is a text step or a step that needs to pull in the contact's phone number using a merge tag), missing an email address (if there is an email step), etc.

- At the top right of the pop-up, you can click **Export** to download a CSV file that will include this list of contacts and issues. You can use this export to go back into contacts and work to update these contacts to resolve the issue.
- At the bottom right of the pop-up, you can click to **Remove Contacts with Errors**. This will add all of the original contacts except for the contacts on this list.
- At the bottom right of the pop-up, you can click **Add to Plan Anyway**. This will add all of the contacts, regardless of the errors it will potentially create. Using this method, you could then fix those exported contacts after they have been added.

←

Review Contact Errors

×

⚠

10 contacts have errors

Would you like to add these contacts to the SmartPlan anyway?

Errors may affect the performance of Task, Email, and Phone SmartPlan.

Contacts with Errors (10)

→ Export

Adam Hughes	Missing phone number
Alan Brock	Missing phone number; Missing birthday
Alex Proa	Missing phone number
Alex Adams	Missing email
Alex Castro	Missing phone number
Alice Bussey	Missing phone number
Alicia Lopez	Missing phone number

Remove Contacts with Errors

Add to Plan Anyway



If you chose to "Add to Plan Anyway," you will see a link, at the top of the next page, to **Review Selected Contacts**. This will pull up a list of all the contacts you are adding to the SmartPlan, with an option to remove them from the list individually. Contacts with errors will show the error reason to the right of their name. Click **Save Changes** when finished.

←

Review Contact Errors

×

⚠

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Remove Contacts with Errors

Add to Plan Anyway



7. Select when you want the SmartPlan to start:

- **Start all now** - If this option is selected, the first step of the SmartPlan will begin immediately, as soon as you confirm.
- **Start all on the following date** - If this option is selected, use the calendar widget to choose a date to start the SmartPlan on.
- **Stagger over the next few days** - If this option is selected, choose the maximum number of contacts, to distribute into the SmartPlan, per day.

← Select Start Date

When should the SmartPlan start?
SmartPlan: Task, Email, and Phone SmartPlan
[Review Selected Contacts \(40\)](#)

Start on

3/18/2022

☐

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.
(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).
Maximum contacts per day
1

Heads up!

- If you have a Twilio account set up, all SMS 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** when you are ready to start the SmartPlan.

←

Select Start Date

×

When should the SmartPlan start?

SmartPlan: Task, Email, and Phone SmartPlan

Review Selected Contacts (40)

Start on

3/16/2022

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Cancel

Confirm