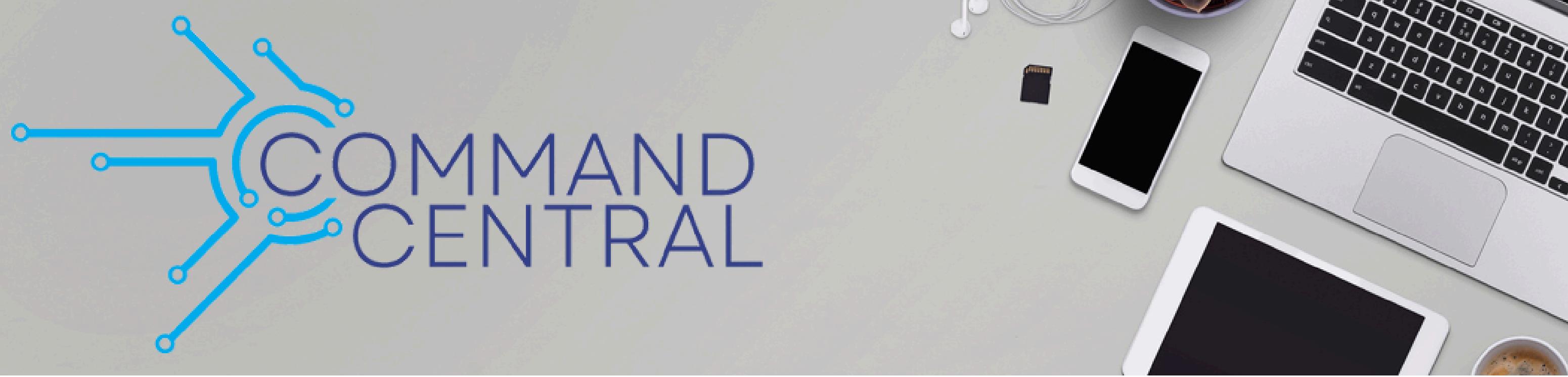




Command Quick Guides

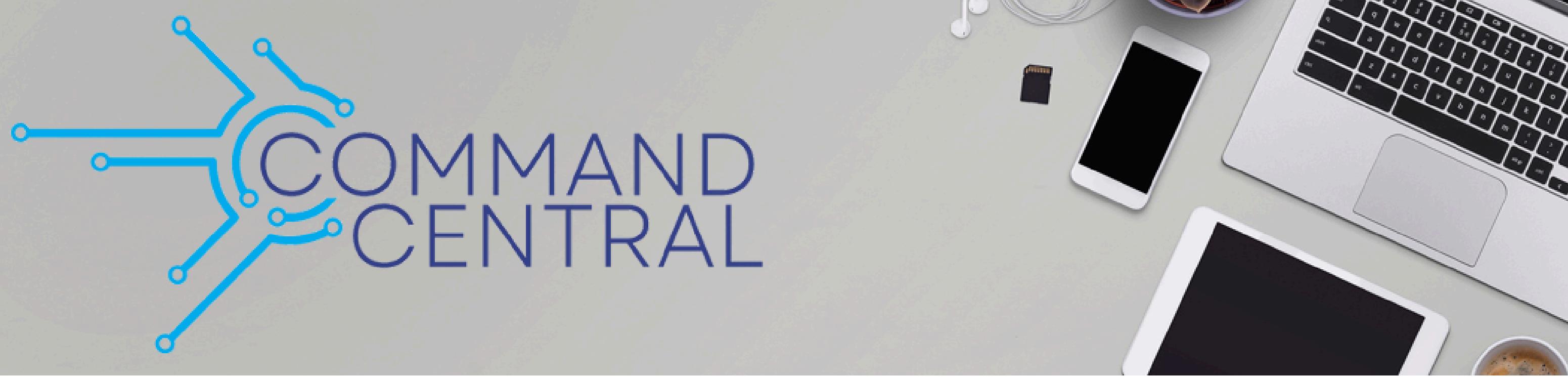
Your Guide to Command:
*Add Contacts to
Smartplan*



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.

The screenshot shows the 'SmartPlans' interface. At the top, there are tabs for 'SmartPlans' (selected), 'My SmartPlans' (disabled), and 'Library'. A 'Create' button is on the right. Below is a search bar. The main area shows a list of 'Published' plans under 'People Plans' (9). The columns are: NAME, CONTACTS, CREATED, DURATION, TOTAL TOUCHES, and ACTIONS. The 'Actions' column contains icons for edit, add contact, and more. The 'Add Contact' icon is highlighted with a red box.

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



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 checked="" 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.co	+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 X

My Long-Term Nurture

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

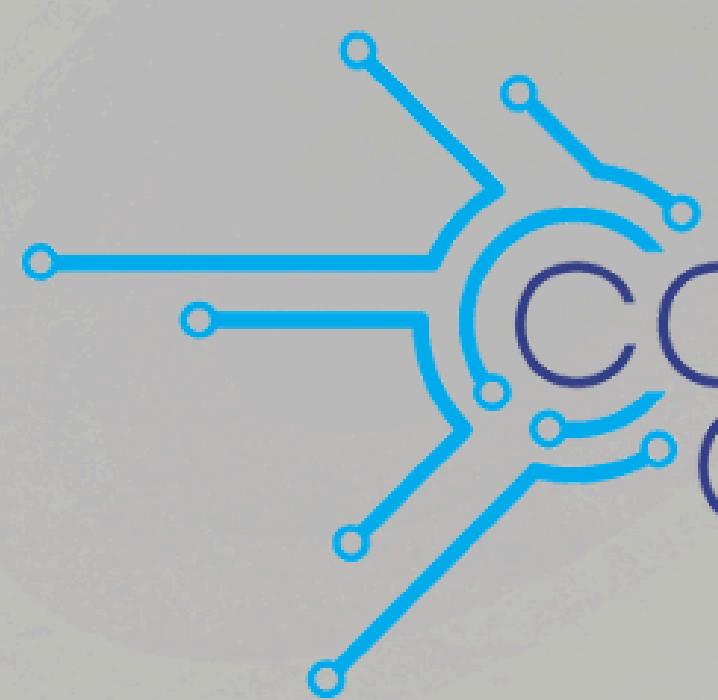
Search By Name Tags

Select All First Name As

<input type="checkbox"/> Aaron Miller L 21 neighborhoods	Sphere Golfer SOI Buyer
<input type="checkbox"/> Abigail Graves L 7 neighborhoods	F & G Luxury Austin Buyers SOI
<input type="checkbox"/> Aby Cies L 3 neighborhoods	C & K Austin Buyers SOI
<input type="checkbox"/> Adam Steele 2 neighborhoods	S & U Austin Buyers

< Viewing 1-20 of 2637 >

Cancel Add to SmartPlan



COMMAND CENTRAL



- **Filter by Tag** - click the **Tags** button, then check or uncheck the box next to your tags, to filter the list by tag.

Add Clients to SmartPlan

My Mid-Term Nurture

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

Search By Name

Select All

Aaron Miller 3 neighborhoods Google Contacts APIN Sync SmartPlan Eligible

Aaron Springsteen 3 neighborhoods Google Contacts APIN Sync

Aaron Miller 7 neighborhoods Google Contacts APIN Sync SmartPlan Eligible

Abigail Graves 7 neighborhoods Google Contacts APIN Sync SmartPlan Eligible

Abby Cies 3 neighborhoods Google Contacts APIN Sync SmartPlan Eligible

Viewing 1-20 of 2698

Austin Buyers

B & E

BNI

Bought

Buyer



- **Sort by Name** - click the Sort drop-down to choose the order in which the contacts appear.

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

Select All

<input type="checkbox"/> Aaron Miller L 21 neighborhoods	Sphere Golfer SOI Buyer	First Name Asc
<input type="checkbox"/> Abigail Graves L 7 neighborhoods	F & G Luxury Austin Buyers SOI	First Name Desc
<input type="checkbox"/> Aby Cies L 3 neighborhoods	C & K Austin Buyers SOI	Last Name Asc
<input type="checkbox"/> Adam Steele 2 neighborhoods	S & U Austin Buyers	Last Name Desc

Viewing 1-20 of 2637

Cancel Add to SmartPlan



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

Add Clients to SmartPlan X

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 ▼

<input checked="" type="checkbox"/>	Aaron Miller L 21 neighborhoods
<input checked="" type="checkbox"/>	Abigail Graves L 7 neighborhoods
<input checked="" type="checkbox"/>	Aby Cies L 3 neighborhoods
<input checked="" type="checkbox"/>	Adam Steele 2 neighborhoods

Sphere Golfer SOI Buyer

F & G Luxury Austin Buyers SOI

C & K Austin Buyers SOI

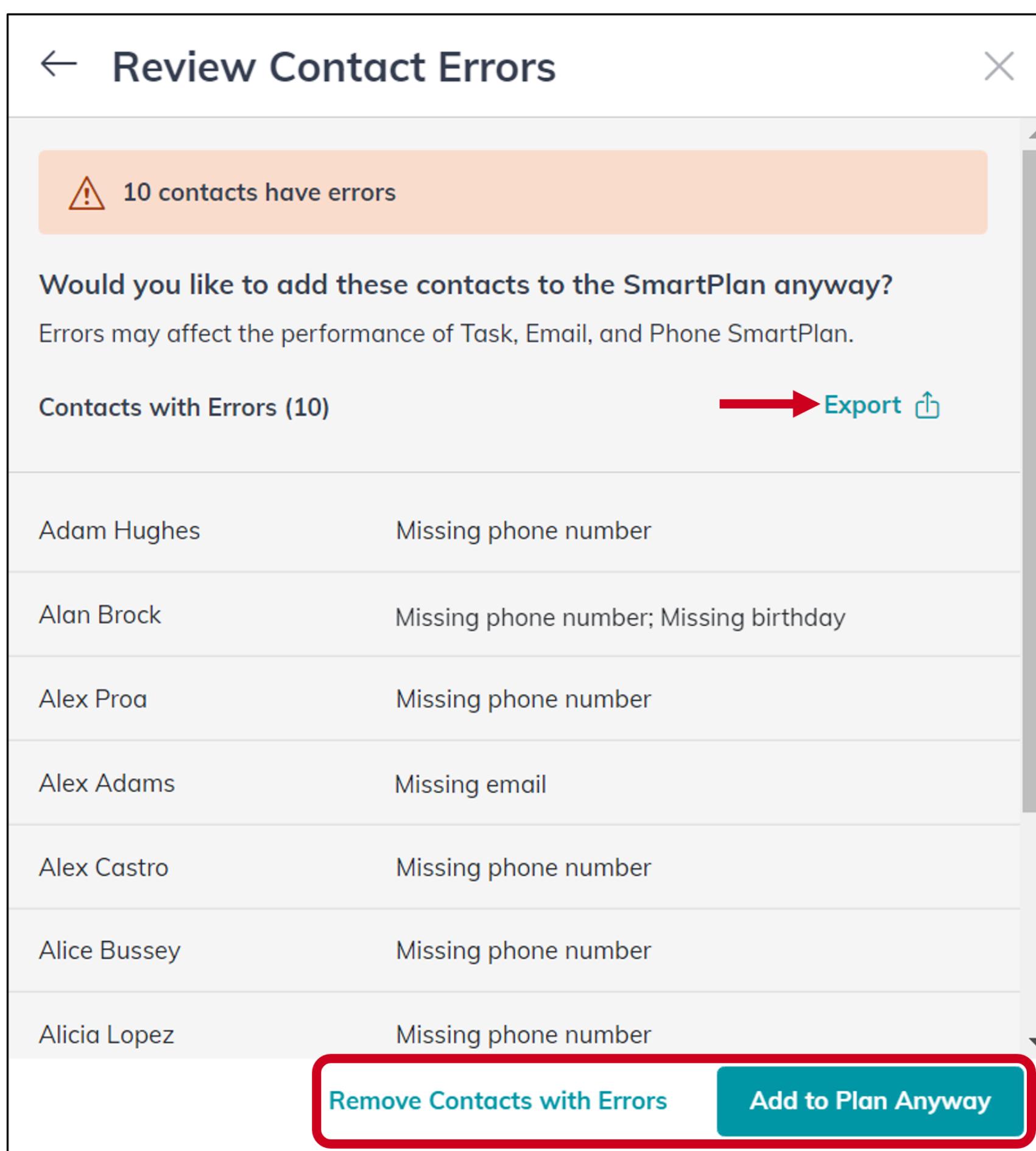
Viewing 1-20 of 2637 >

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.





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 X

⚠ 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



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 X

When should the SmartPlan start?
SmartPlan: Task, Email, and Phone SmartPlan

[Review Selected Contacts \(40\)](#)

Start on
3/18/2022 calendar icon

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 up/down arrows

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 X

When should the SmartPlan start?
SmartPlan: Task, Email, and Phone SmartPlan

[Review Selected Contacts \(40\)](#)

Start on 3/16/2022 

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).

! **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**