Command Quick Guides

Your Guide to Command:

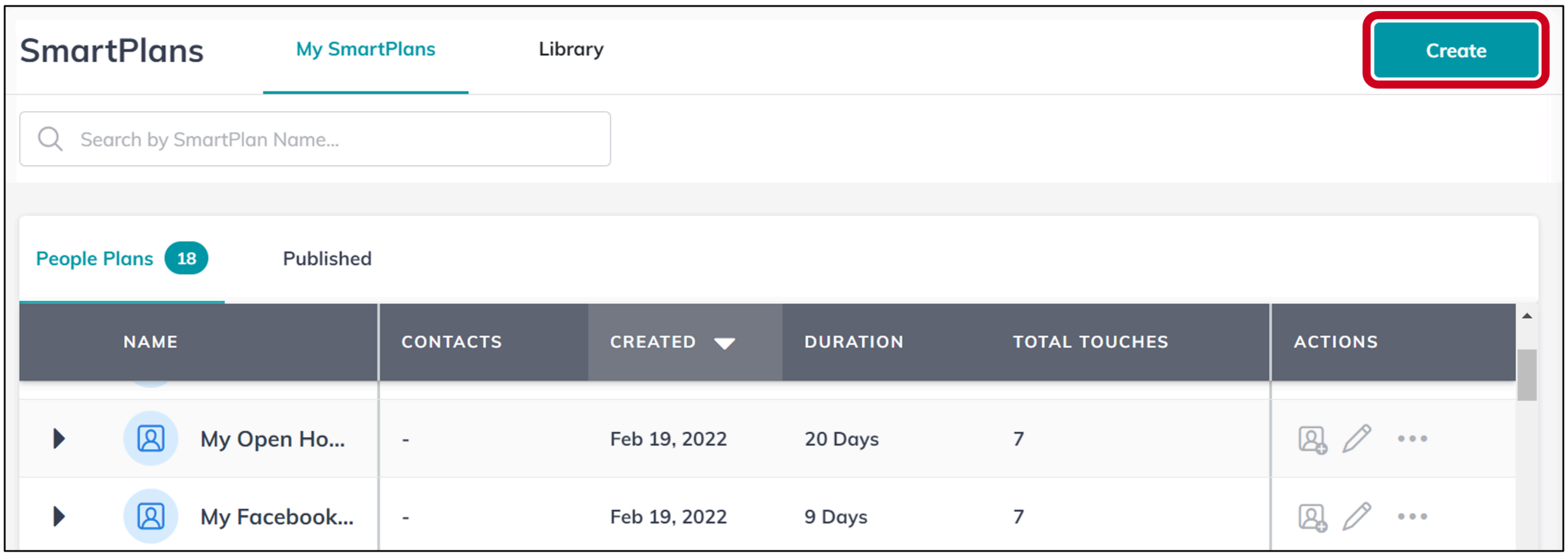
Create a Custom Smartplan

Access

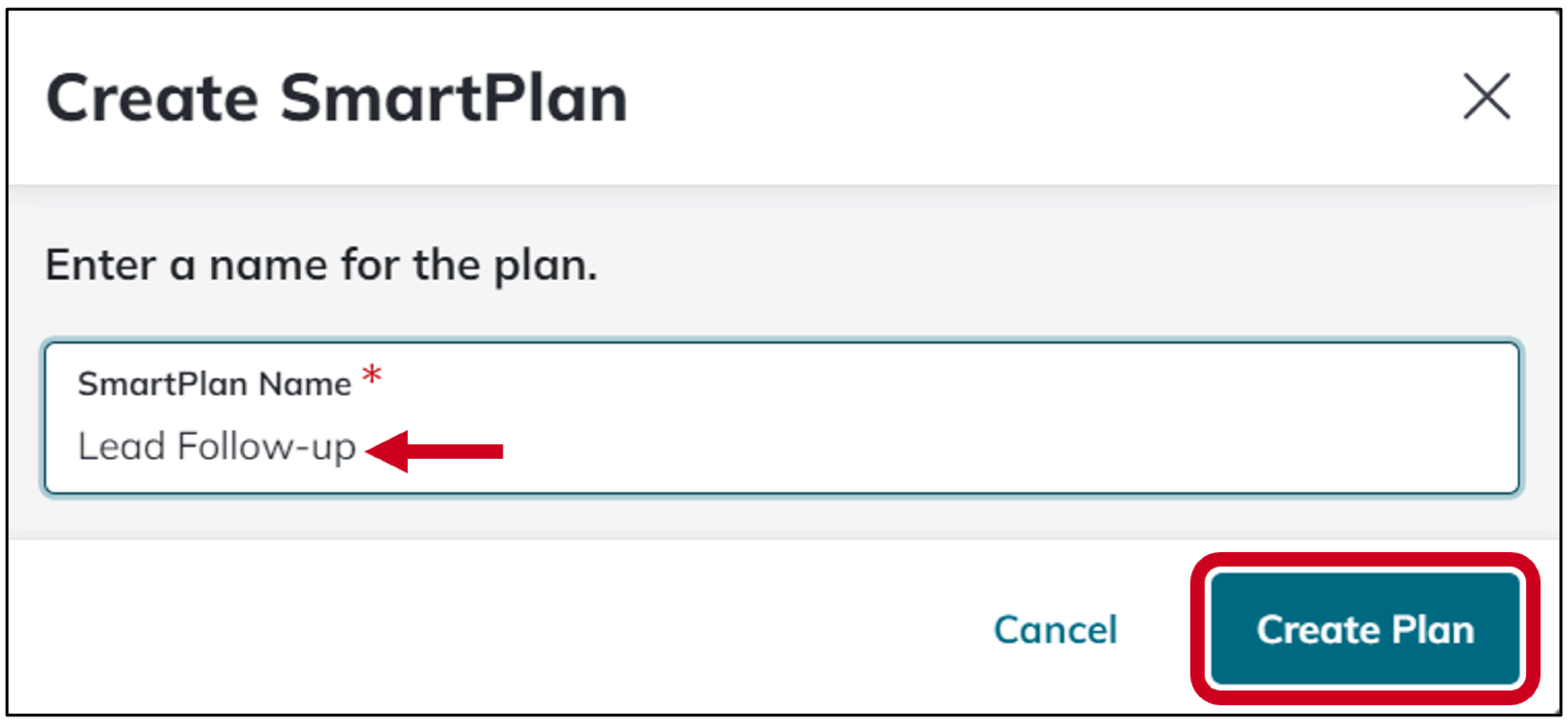
1. Log in to https://agent.kw.com with your Keller Williams login credentials.

2. 2. Click the **SmartPlans icon**, , on the left side of the home page.

3. Click **Create**, at the top right of the page.



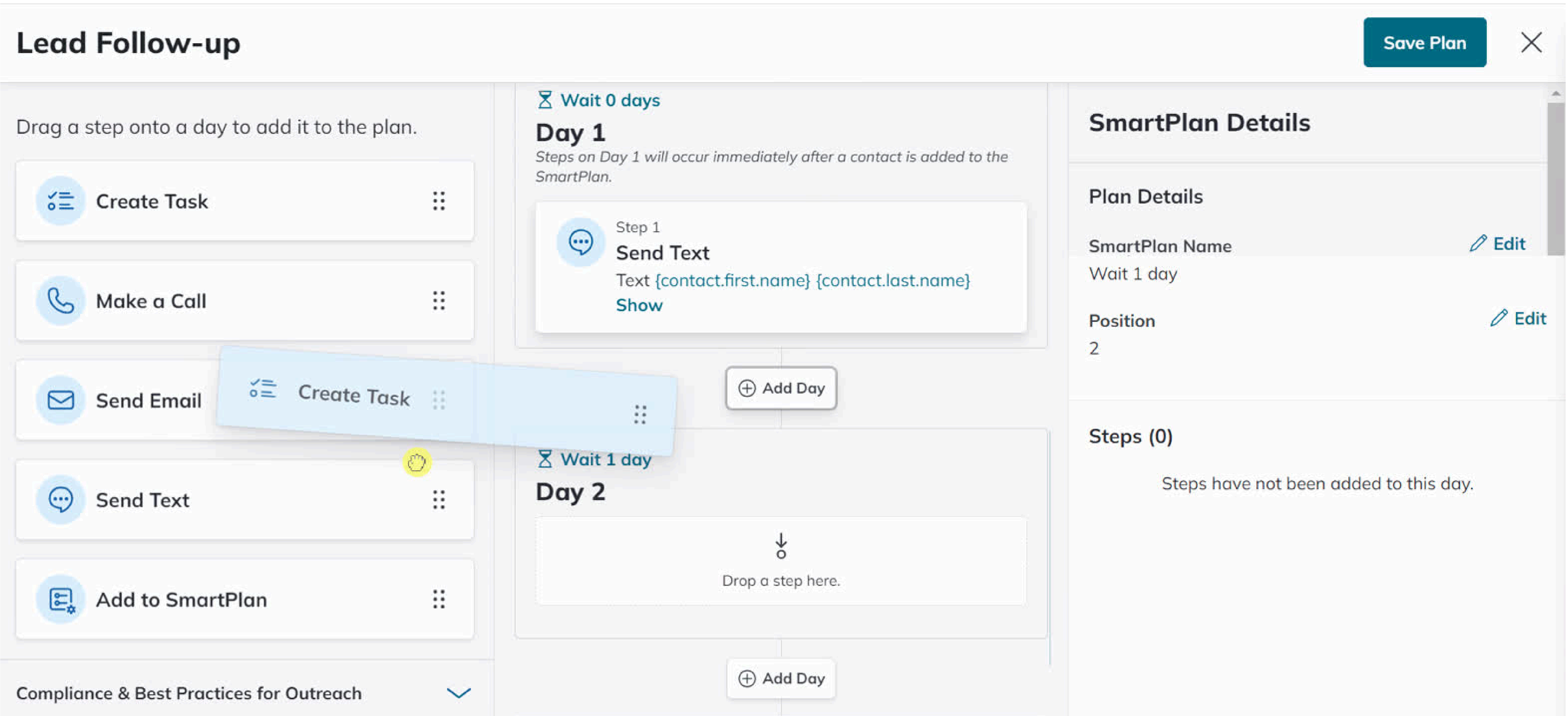
4. Enter your SmartPlan name and click **Apply**.



Add Days and Steps

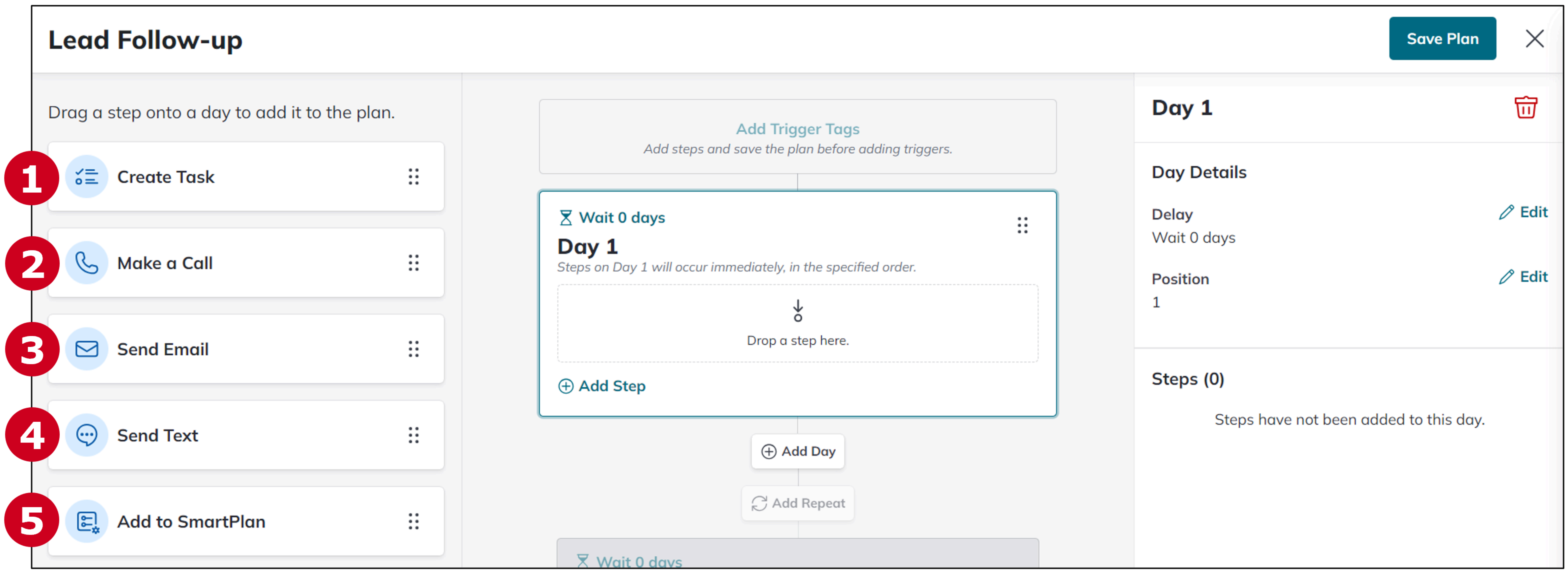
1. Find where you want to add a new Day, then click + Add Day.

2. When you are ready to add a step, find the step on the left side of the page, then click and drag it to the day you want to add it to:



There are 5 types of steps you can add. Once you add the step, you will need to configure and save that step, on the right side of the page, before you can continue:

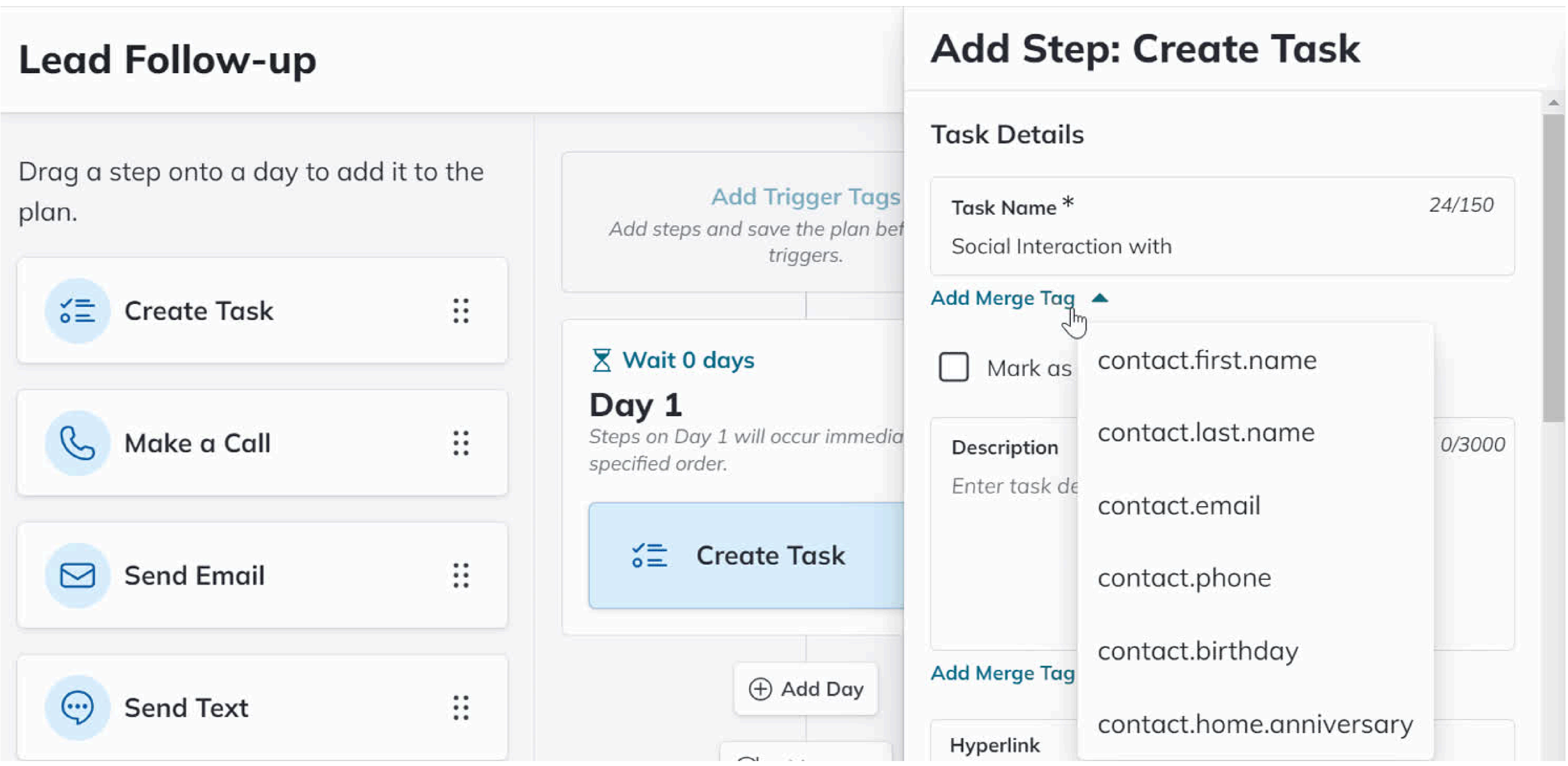
- Create Task
- Make a Call
- Send Email
- Send Text
- Add to SmartPlan



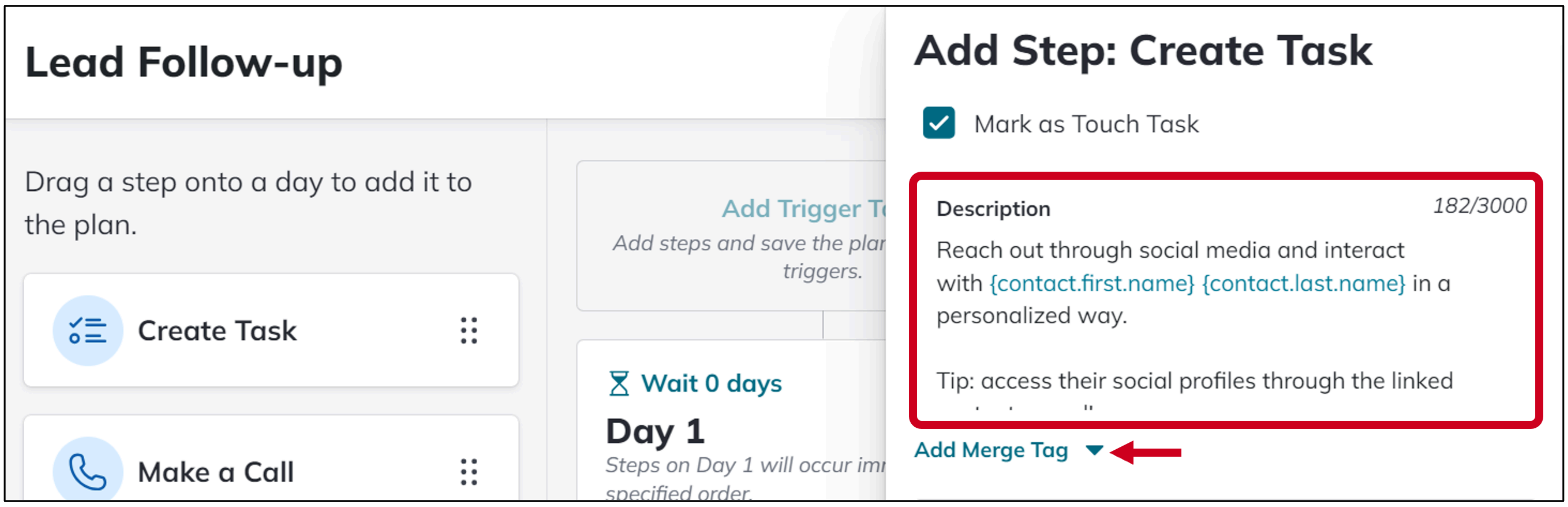
Make a Call

1. Enter the **Task Name**, and select whether this is a **Touch Task** using the checkbox.

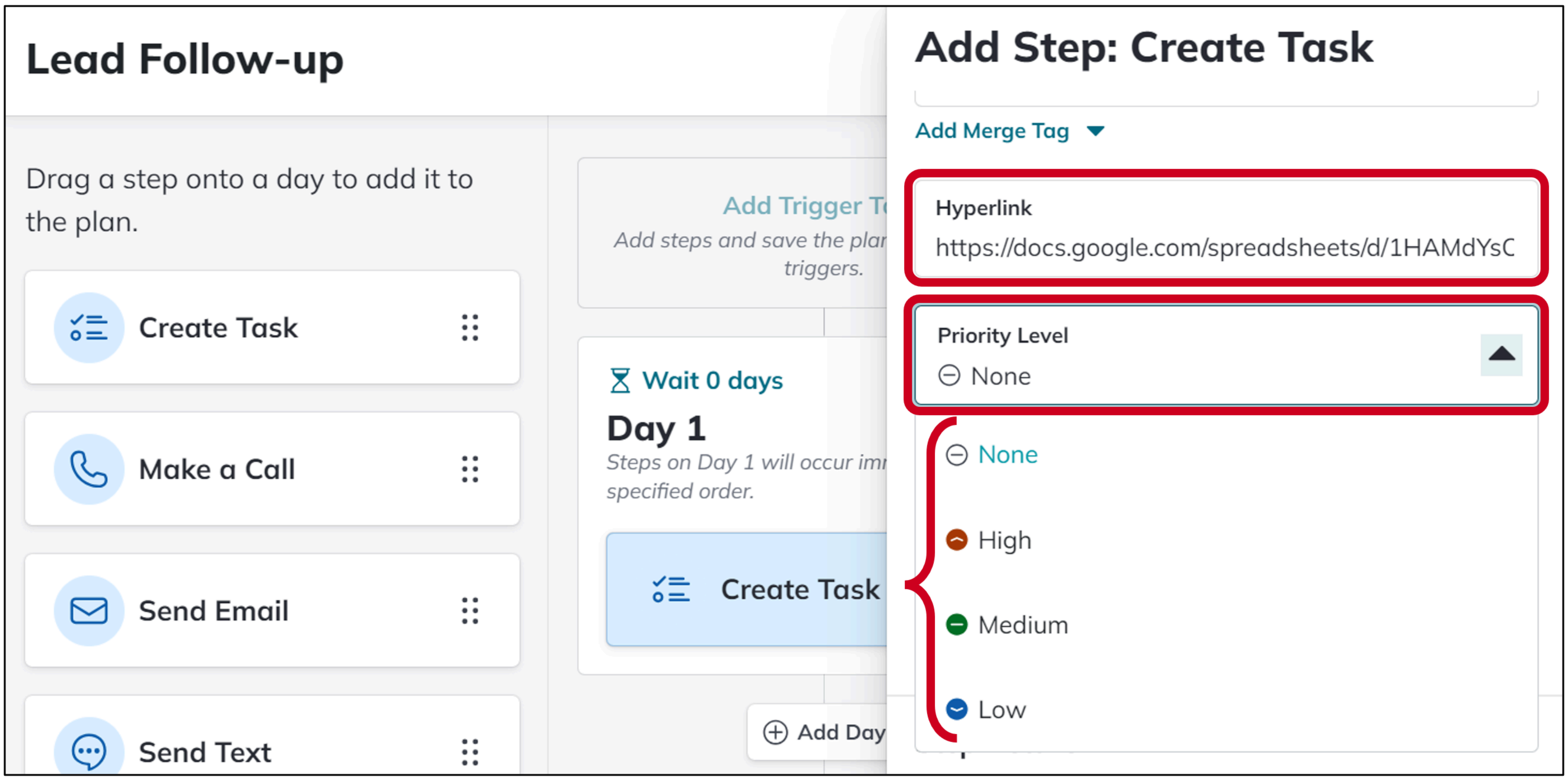
- You have the ability to use the **Add Merge Tag** drop-down, below the Task Name field, which gives you the ability to have contact specific information in the task name (e.g. "Social Interaction with {contact.first.name} {contact.last.name}").



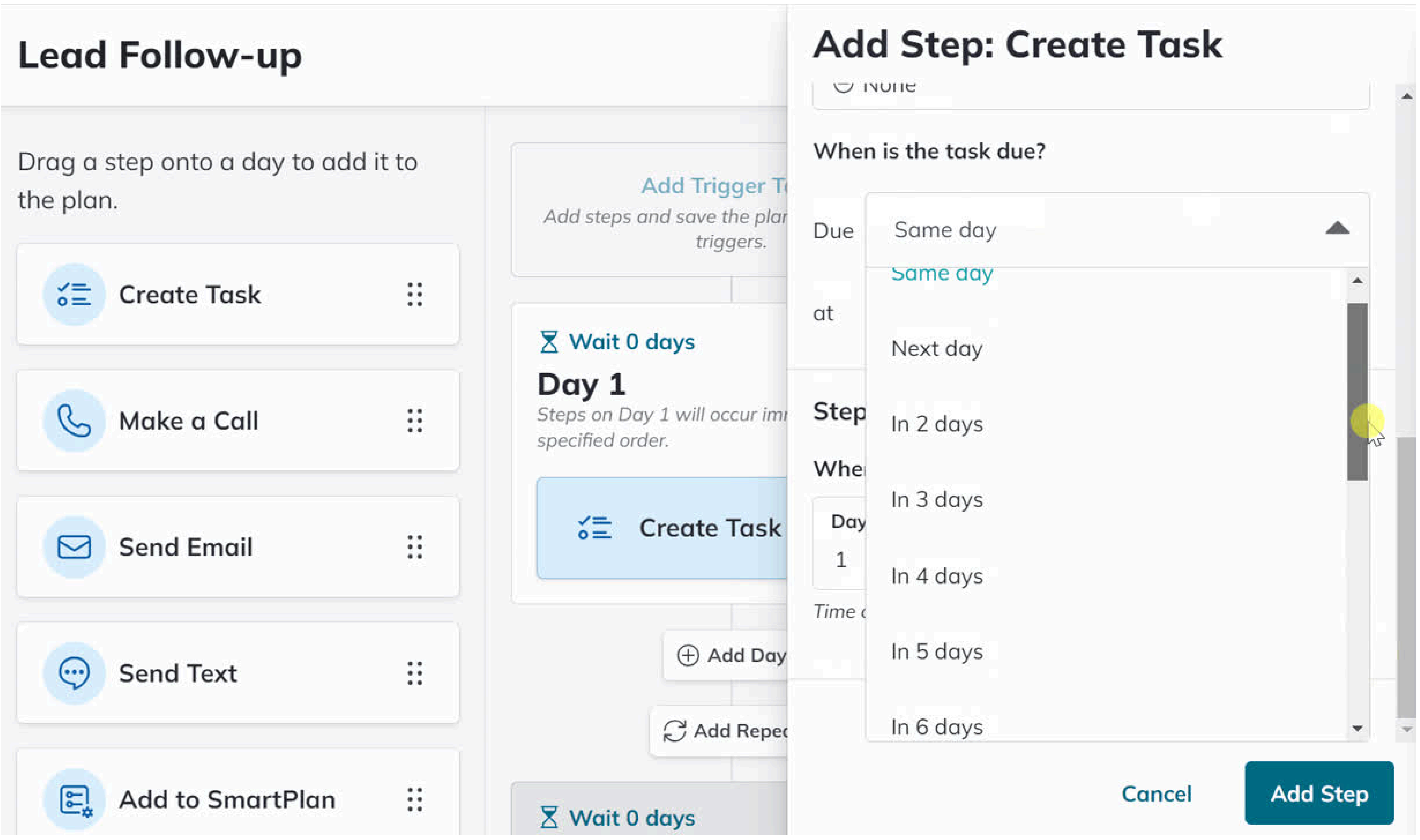
2. Enter a **Task Description**.



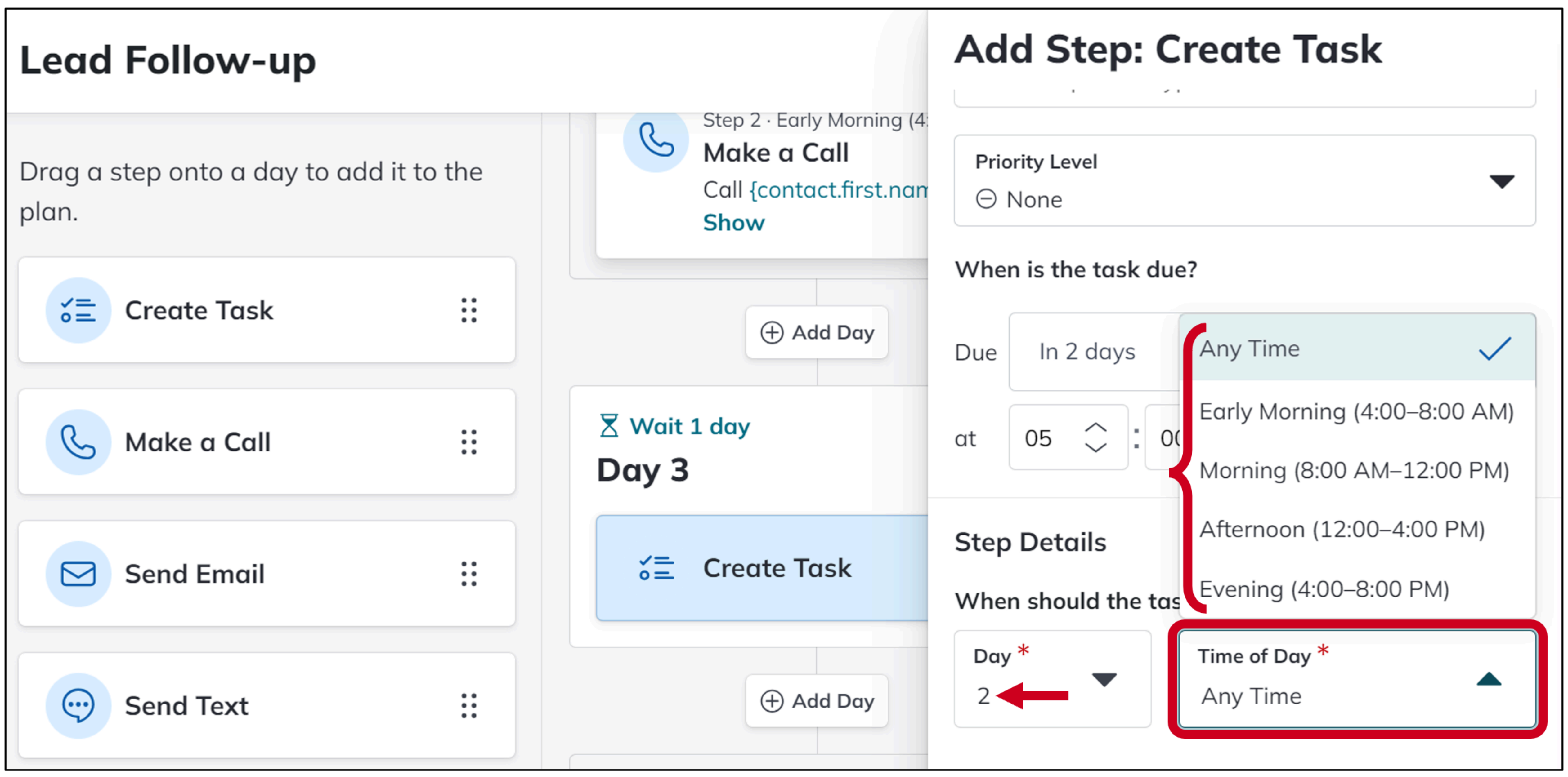
3. Next, you have the option of entering a **Hyperlink** and set the **Priority Level** for the task.



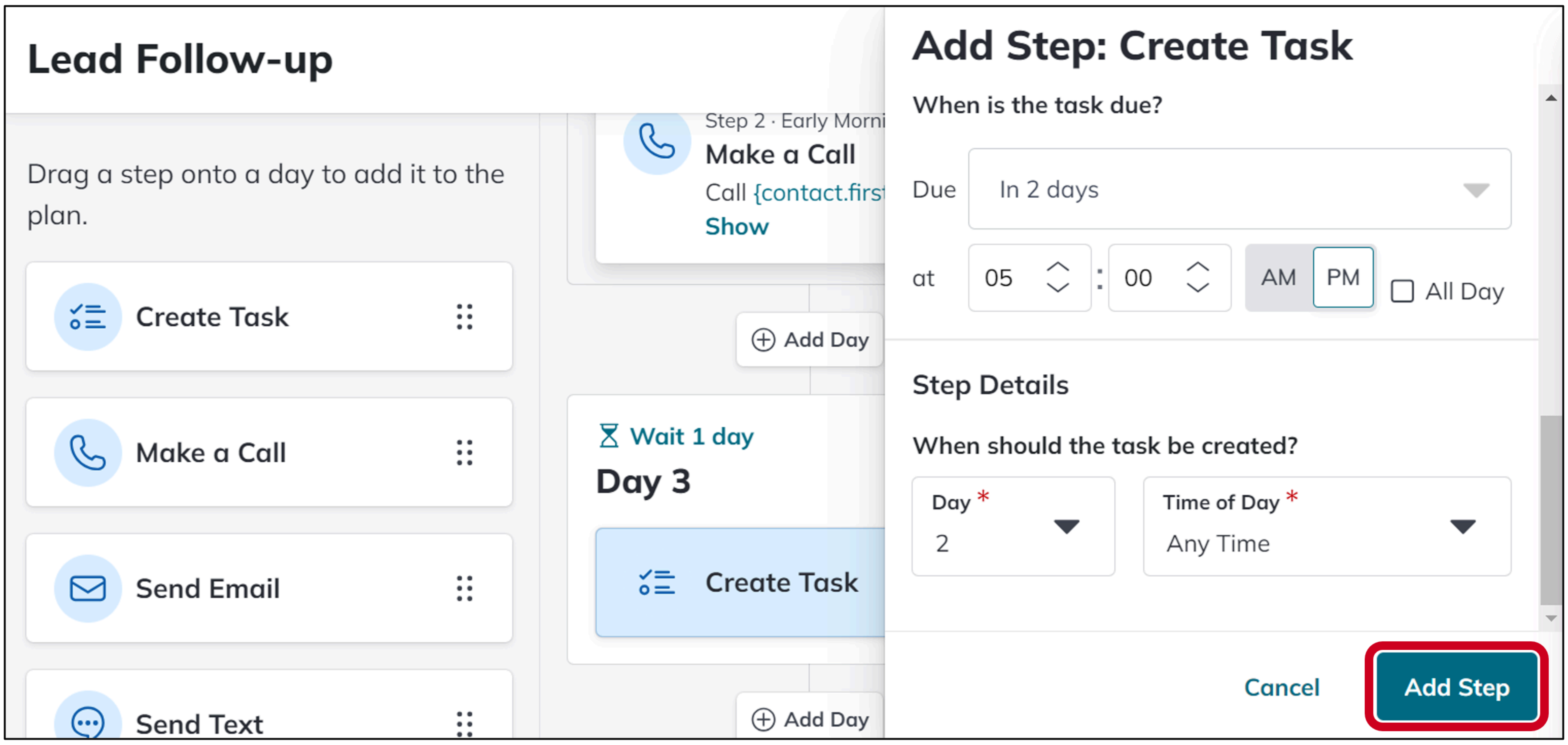
4. the "When is the task due?" field, select how you want the **due date of the task** handled. Once the task populates, use the drop-down to select when it should be due (from Same Day to 14 days) and then select what time you want the task to be due.



5. In the "When should the task be created?" field, select the **Time of Day** you want the task to populate.

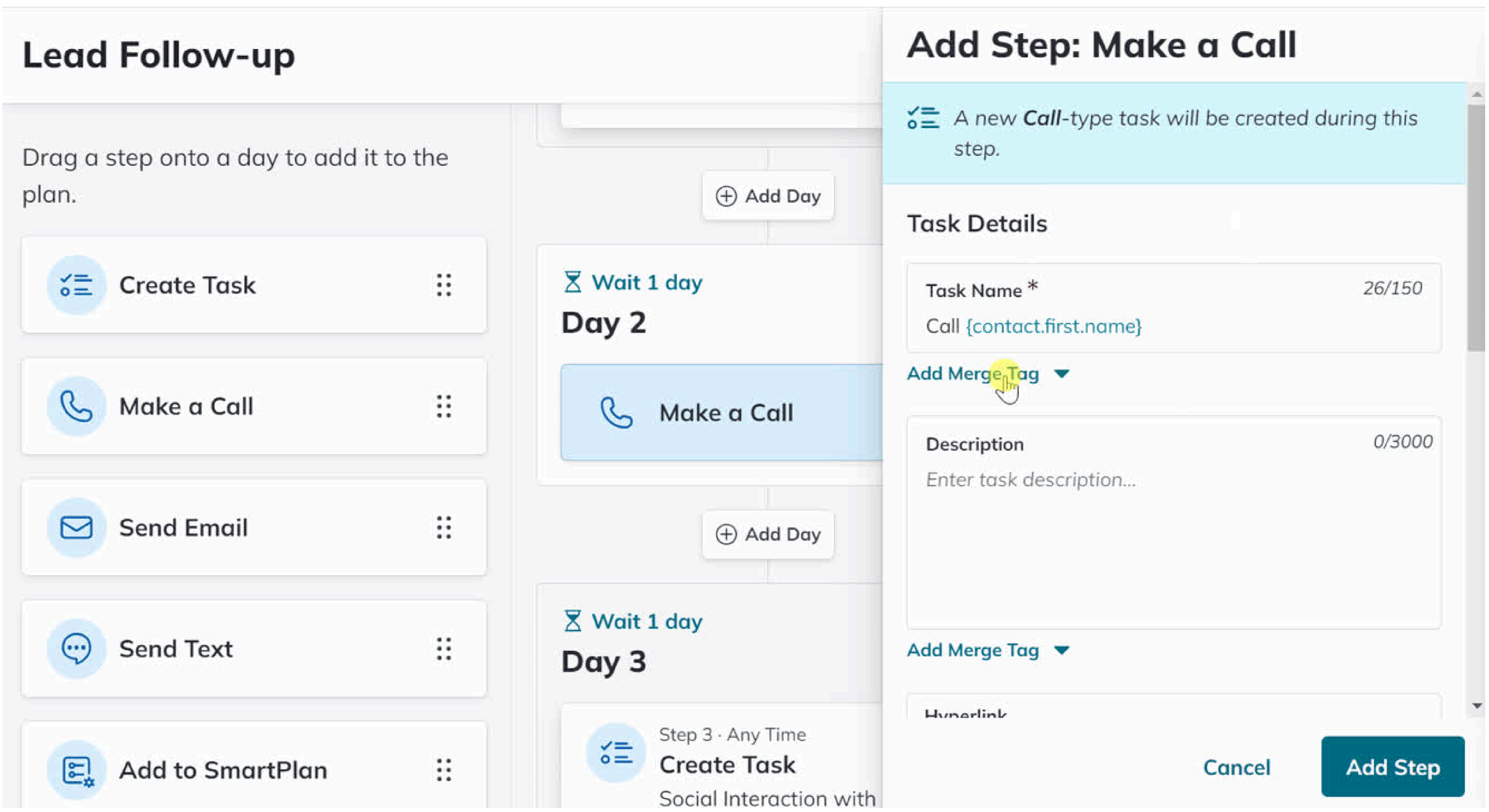


6. Click **Add Step,** at the bottom right of the page.

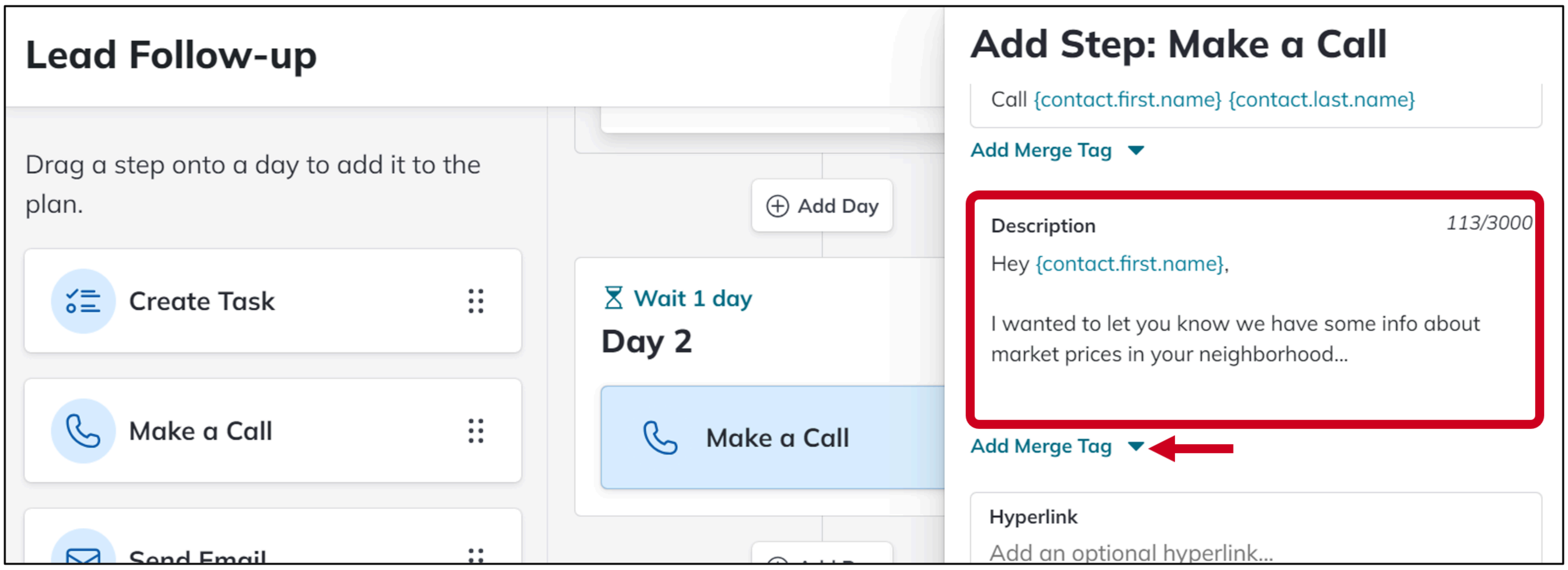


Create Task

1. Enter the **Task Name**, and select whether this is a **Touch Task** using the checkbox.



2. Enter a **Task Description**.



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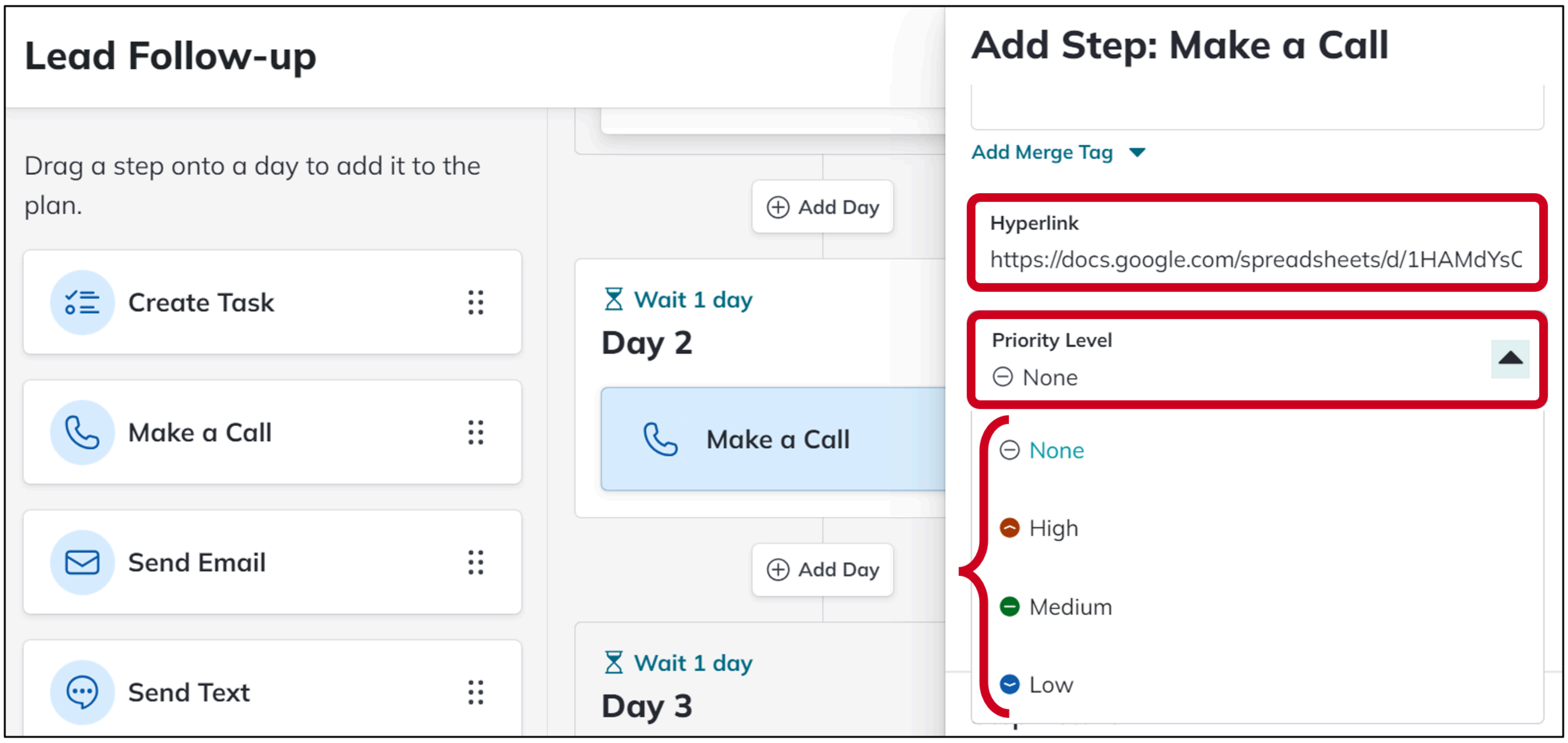

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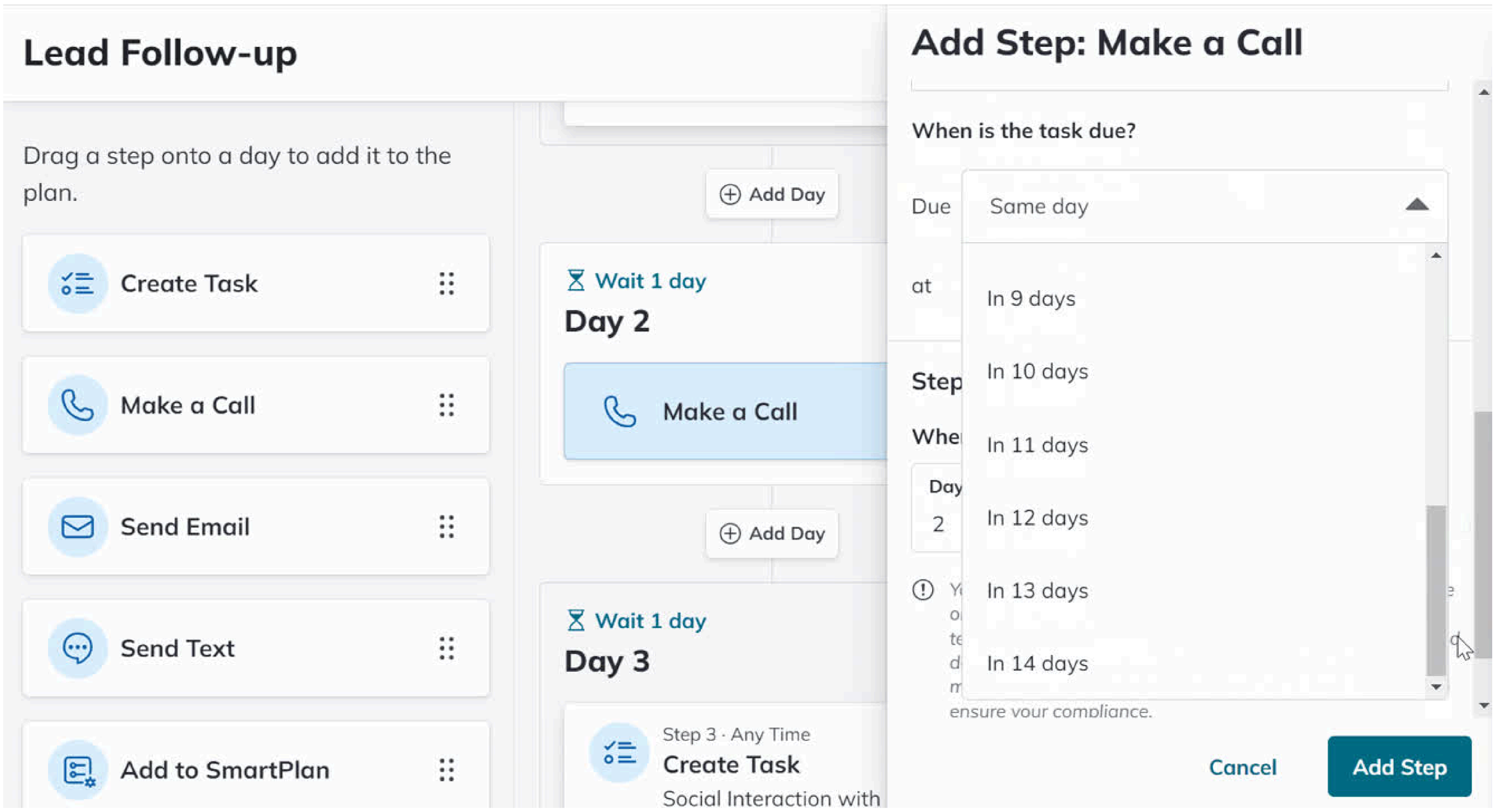

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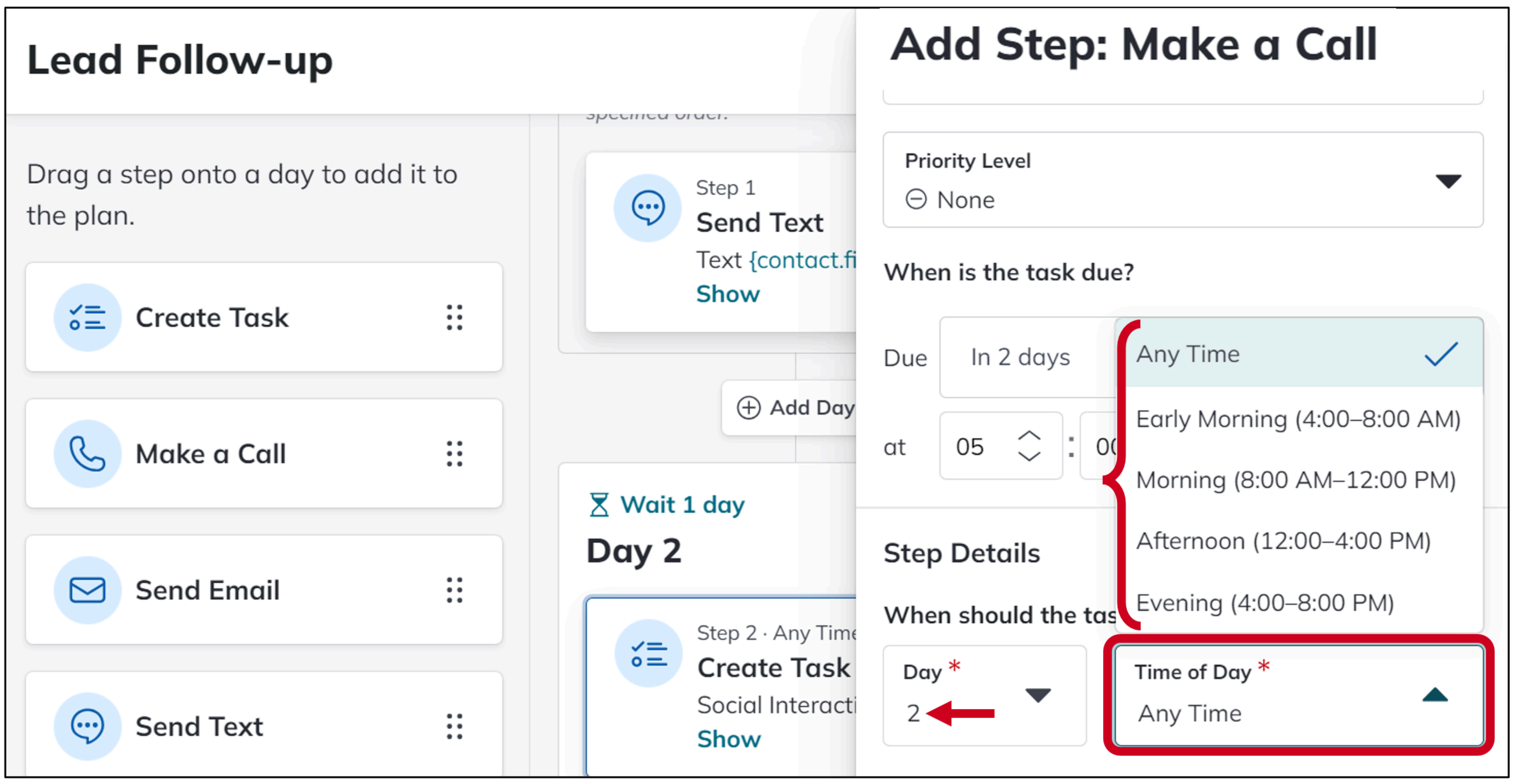
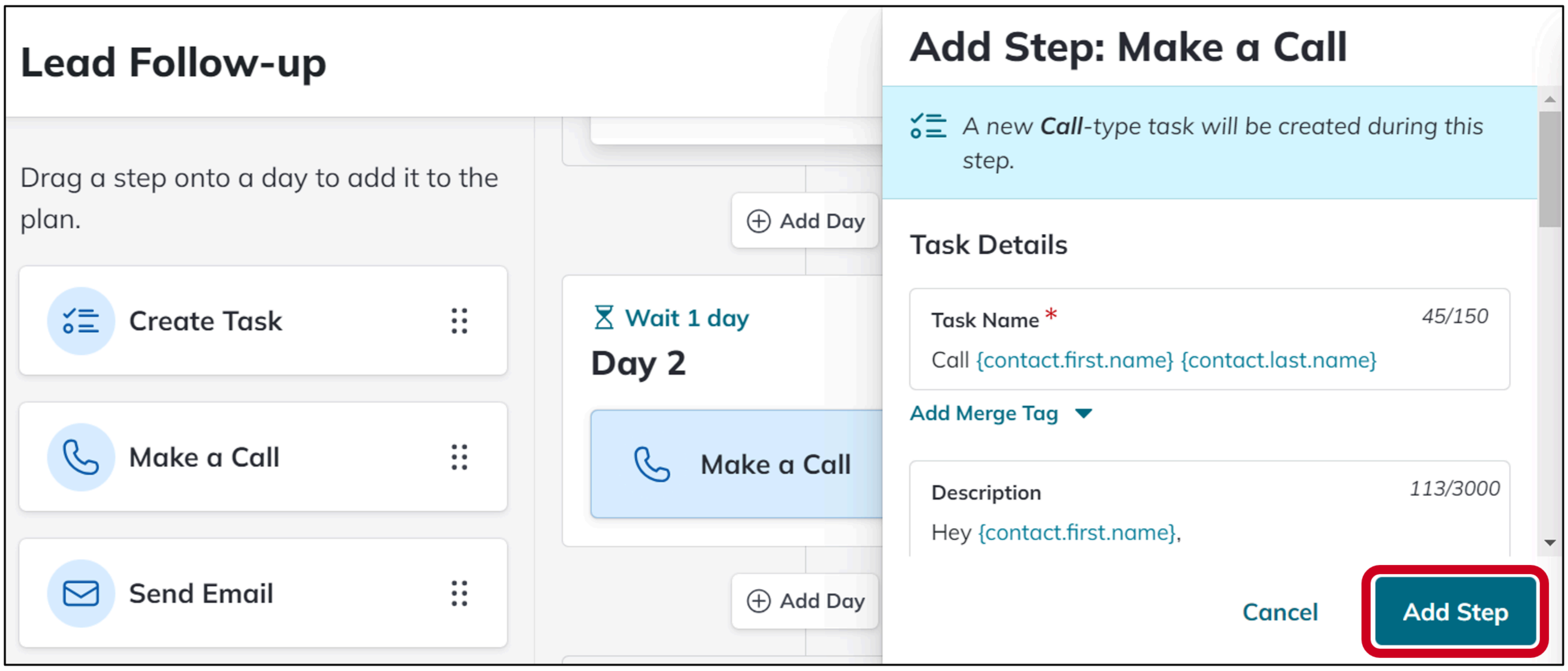
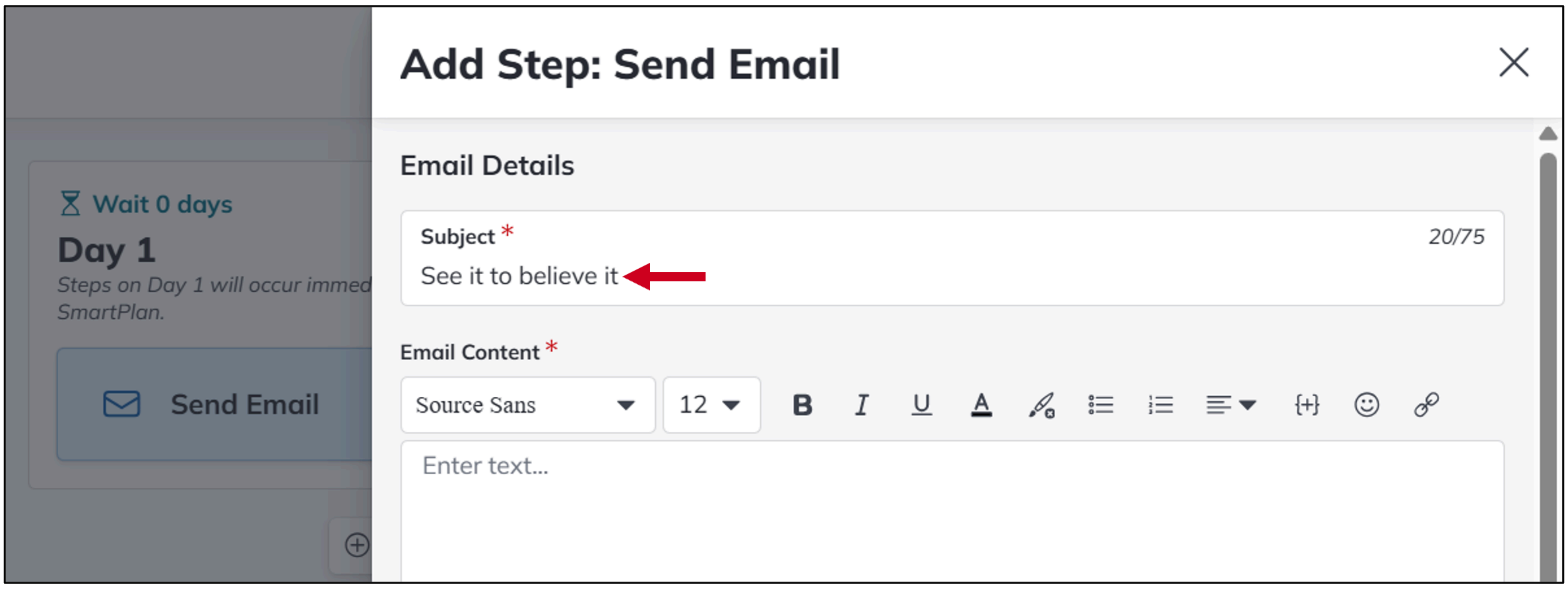


6. Click **Add Step**, at the bottom right of the page.

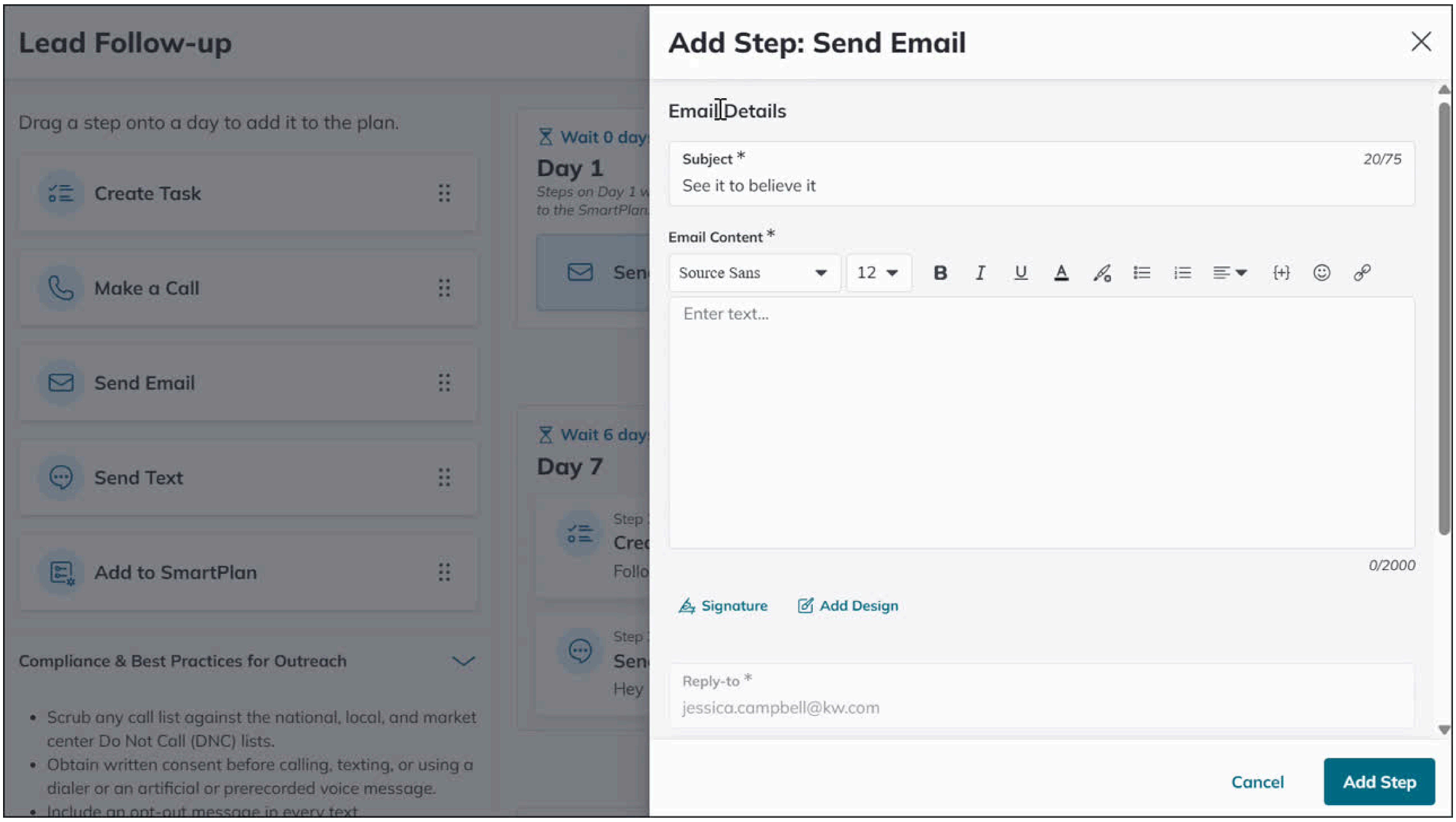


Send Email

1. Enter an **Email Subject**.



2. If you want to send an Email Design, instead of a simple email, click the **Add Design** button, at the bottom right of the modal. This will allow you to select an existing Email Design, with the opportunity to make last minute edits (**Edit Design** > [edit the Design]() > **Save & Close**), and/or click to Select Design.



3. If you didn't select a design, enter the Body of the email. There are a few formatting options you have here:

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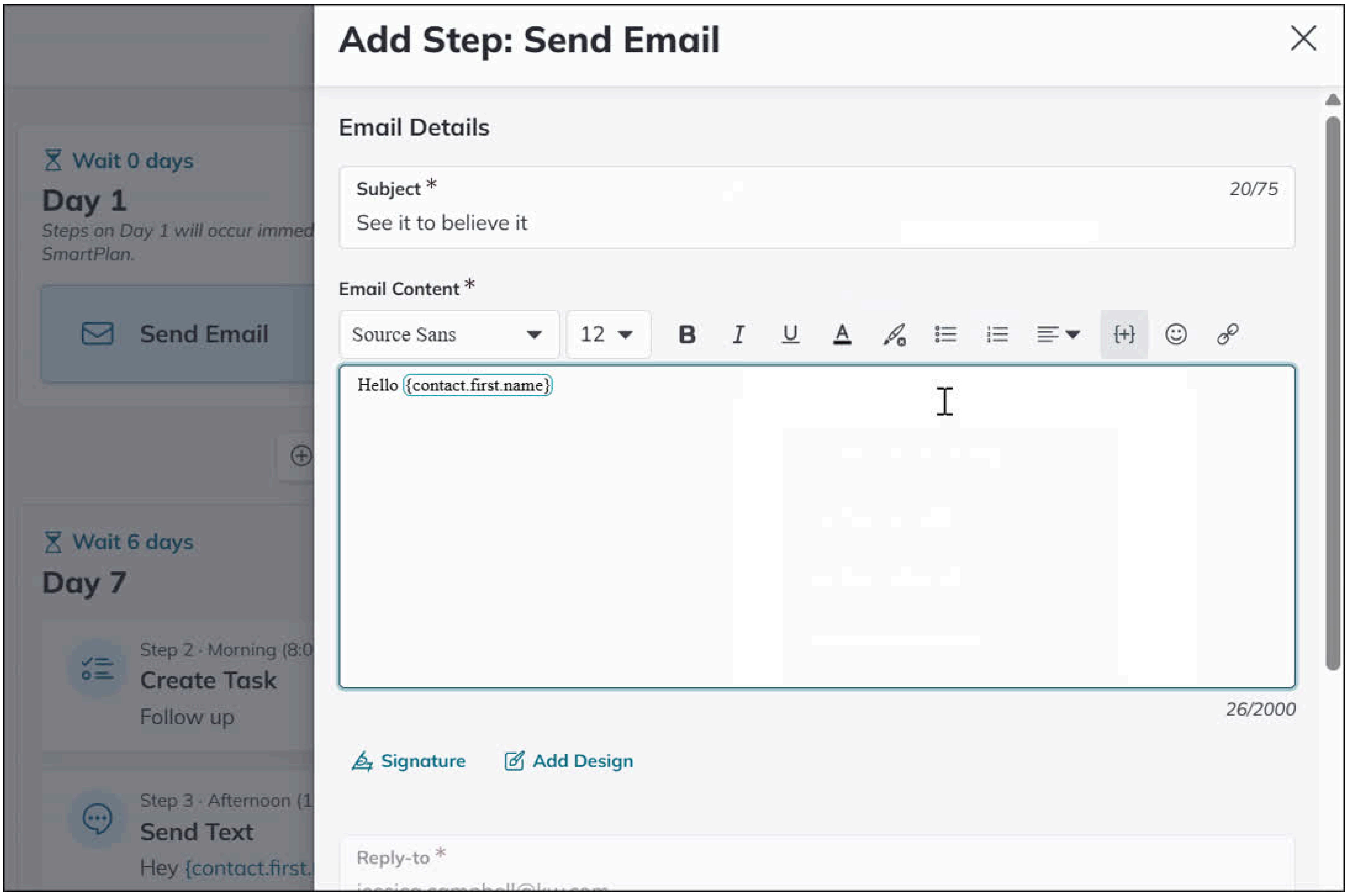

4. If you want to add a signature, click **Signature**, at the bottom of the modal, and select the signature you want to add to the email.

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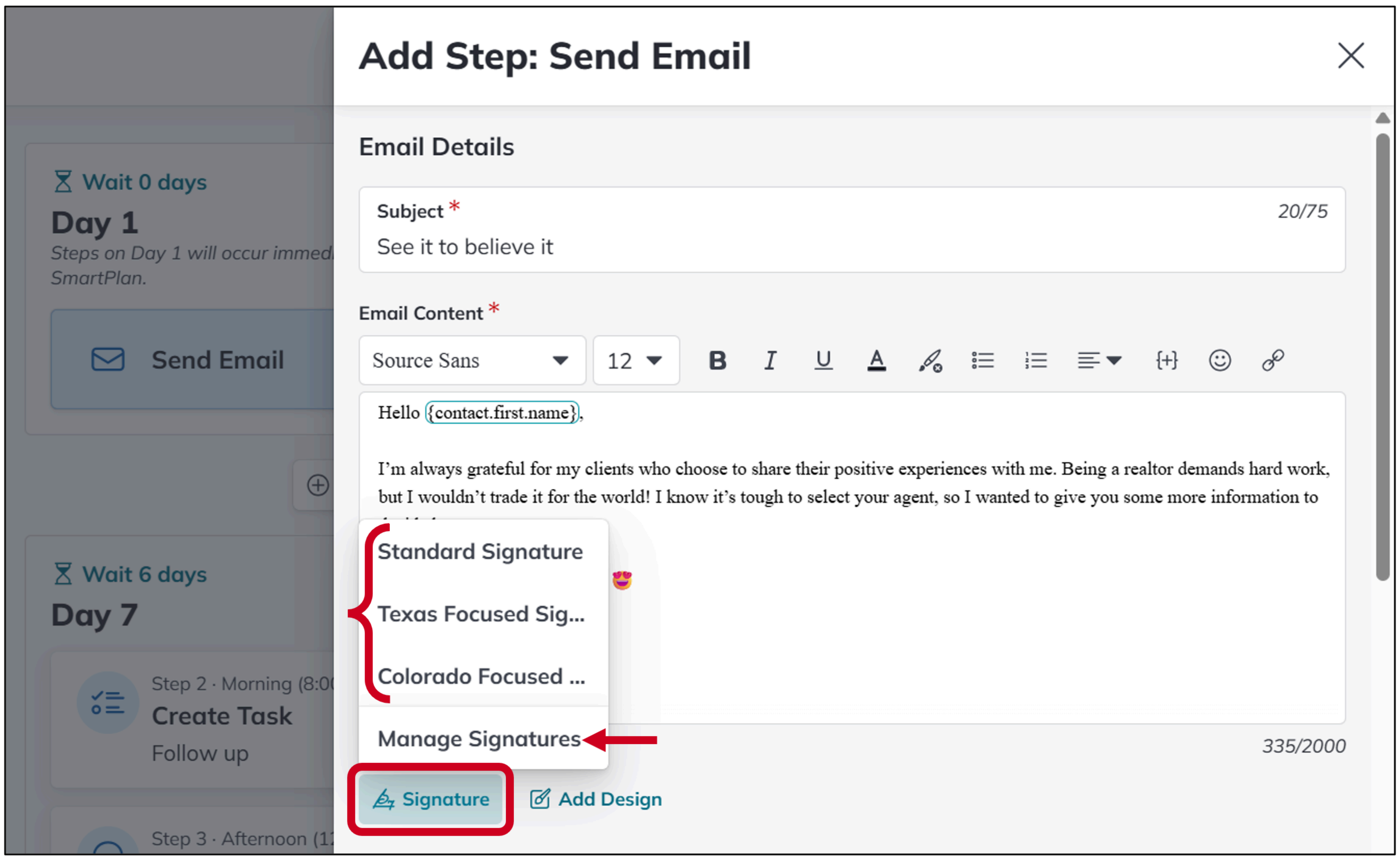
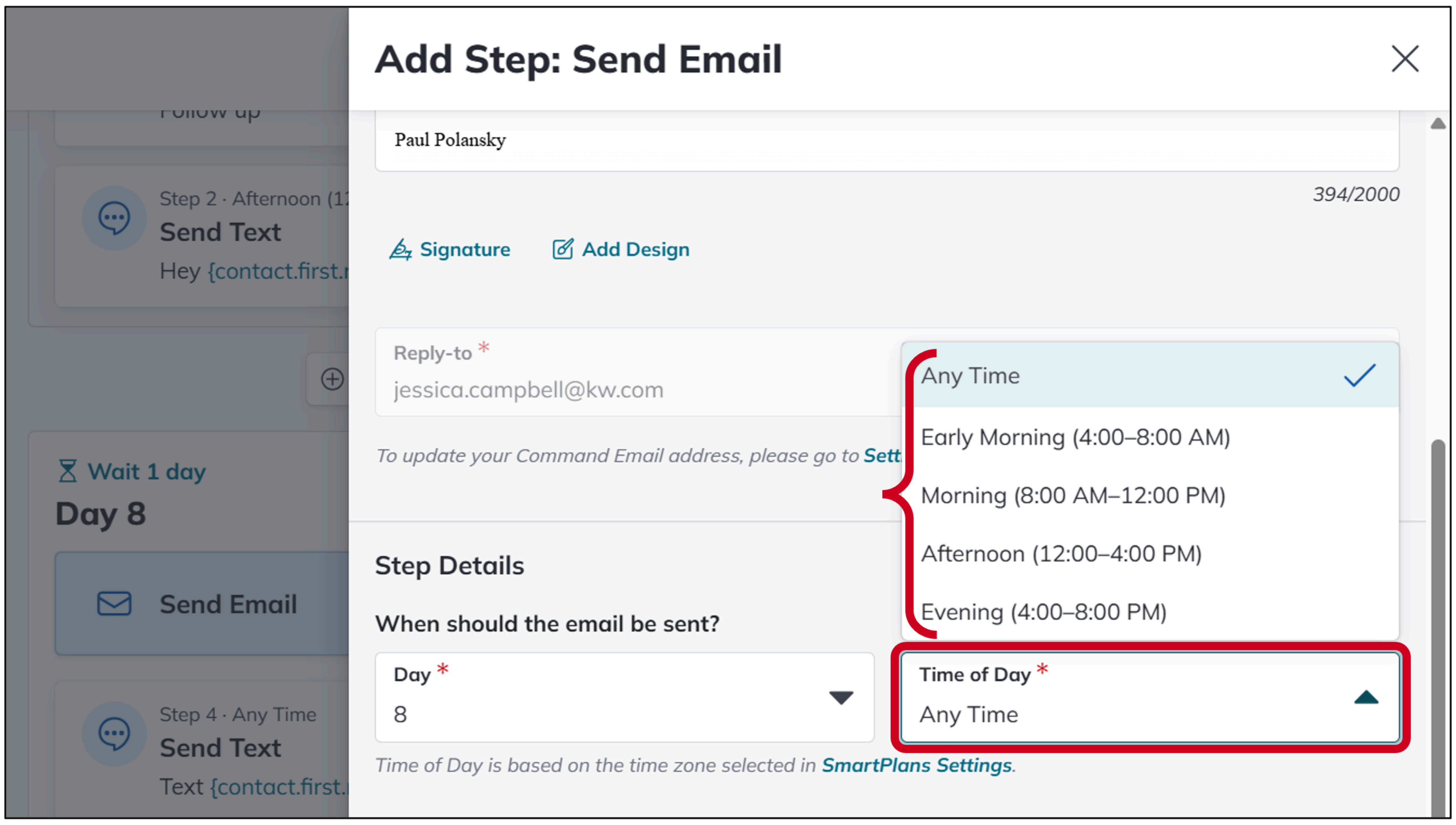
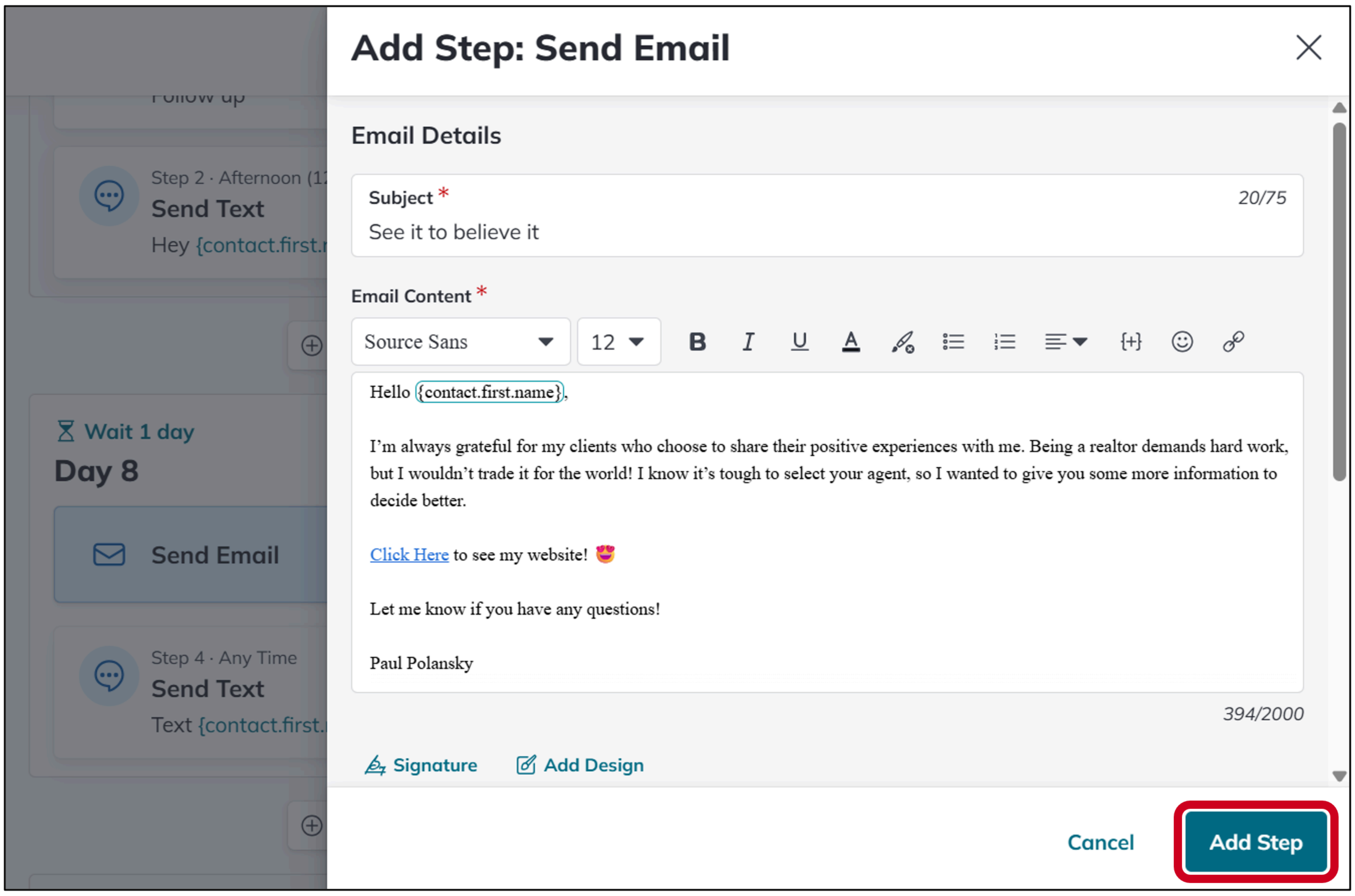


5. In the "When should the email be sent?" field, select the **Time of Day** you want the email to be sent (Any Time, Early Morning, Morning, Afternoon, Evening).



6. Click **Add Step**, at the bottom right of the page.



Send Text

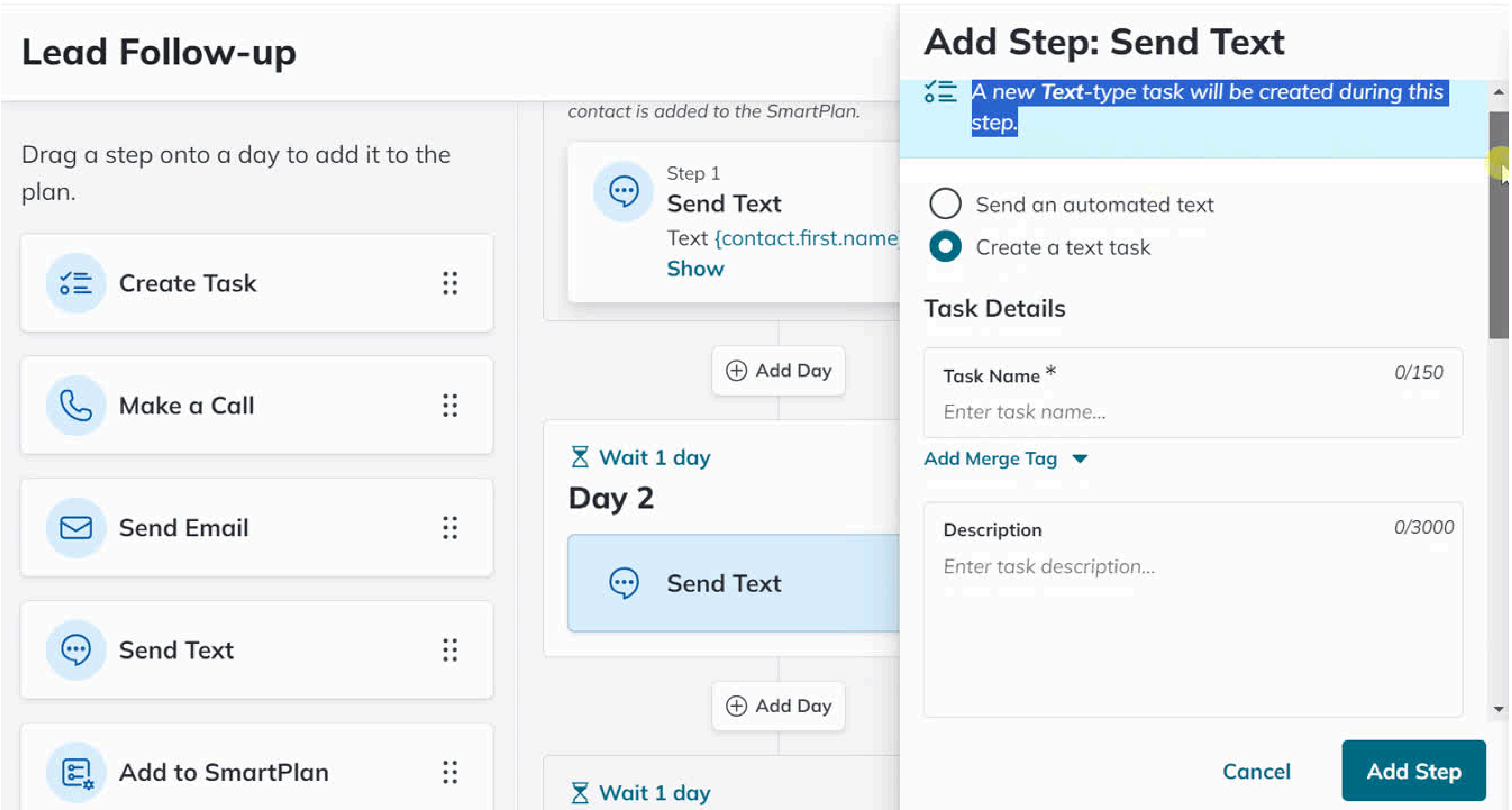
6. Click **Add Step**, at the bottom right of the page.

Send Text

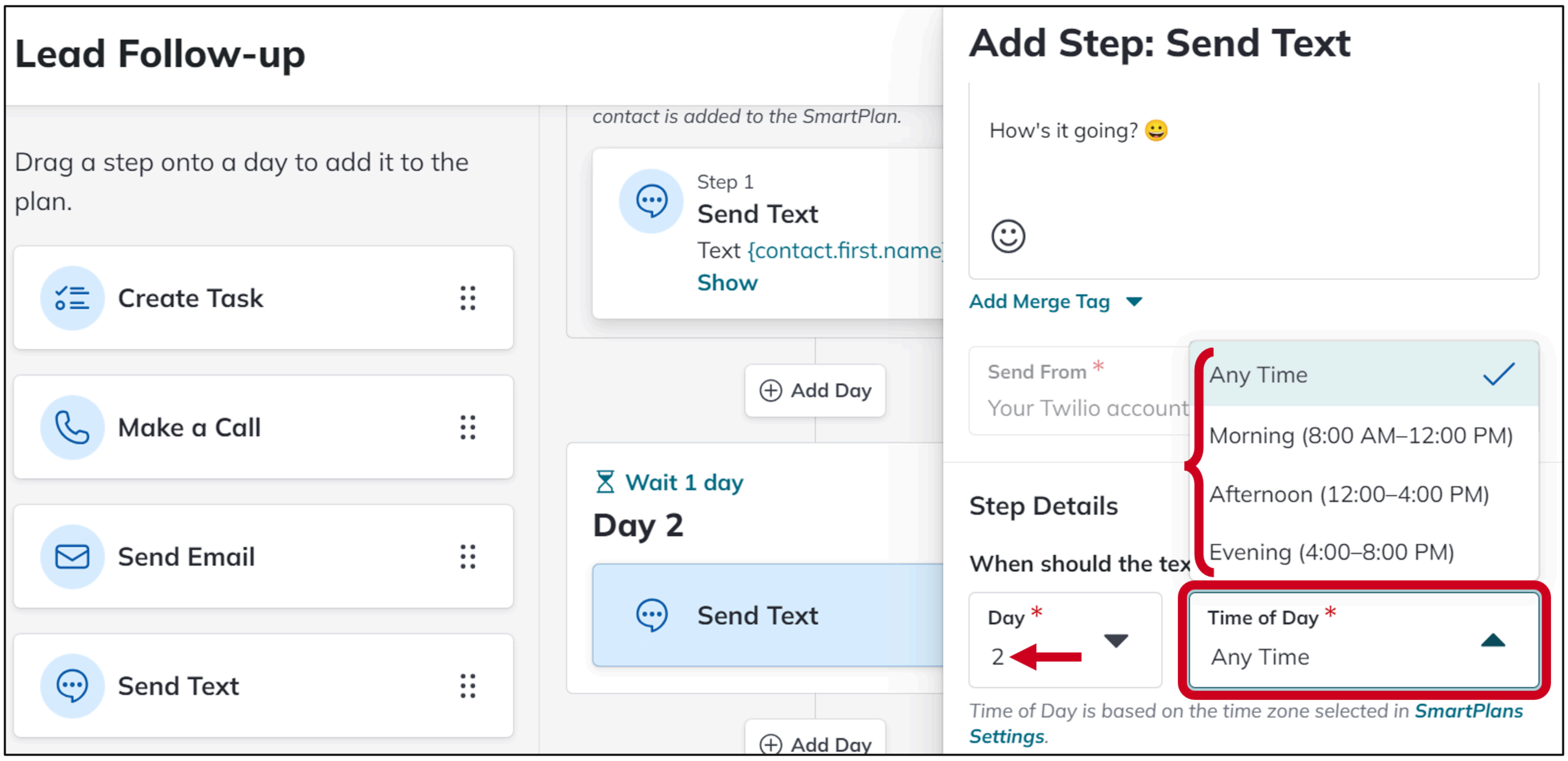
1. Choose to **send an automated text message** from your SmartPlan, using [Twilio](), or create a text task.

2. If you choose to send an automated text message, using Twilio, select whether you want to use a **Static** or **Dynamic** Text Type, then enter the **Text Content.**

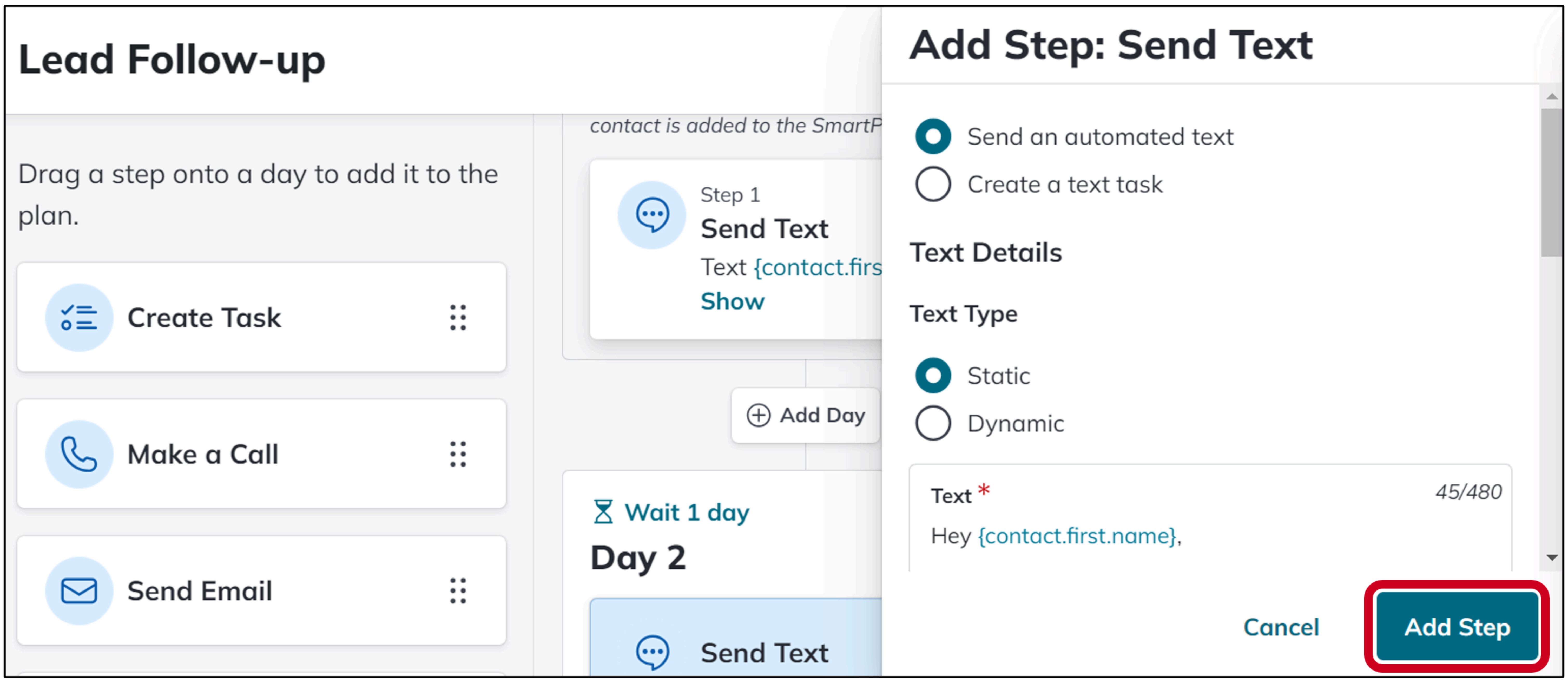
- **Static** - with this option, you can set one text message that will be sent in this step, which will repeat if the SmartPlan repeats.
- **Dynamic** - with this option, you can add multiple text messages for the same step. Each time the SmartPlan repeats, it will send a different text message to your contact, when this step is triggered



3. In the "When should the text be sent?" field, select the **Time of Day** you want the text to be sent (Any Time, Morning, Afternoon, Evening).

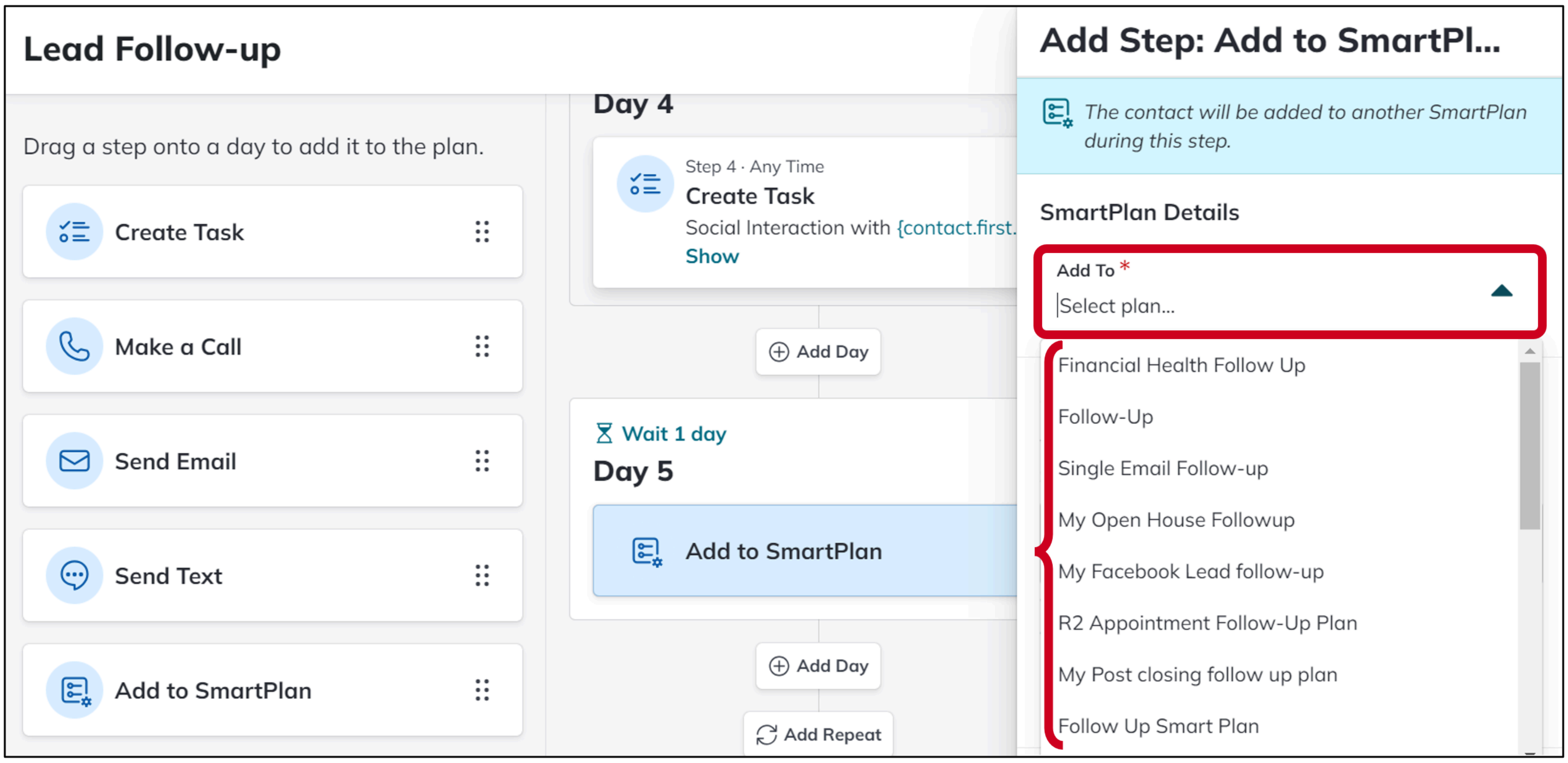


4. Click **Add Step**, at the bottom right of the page.

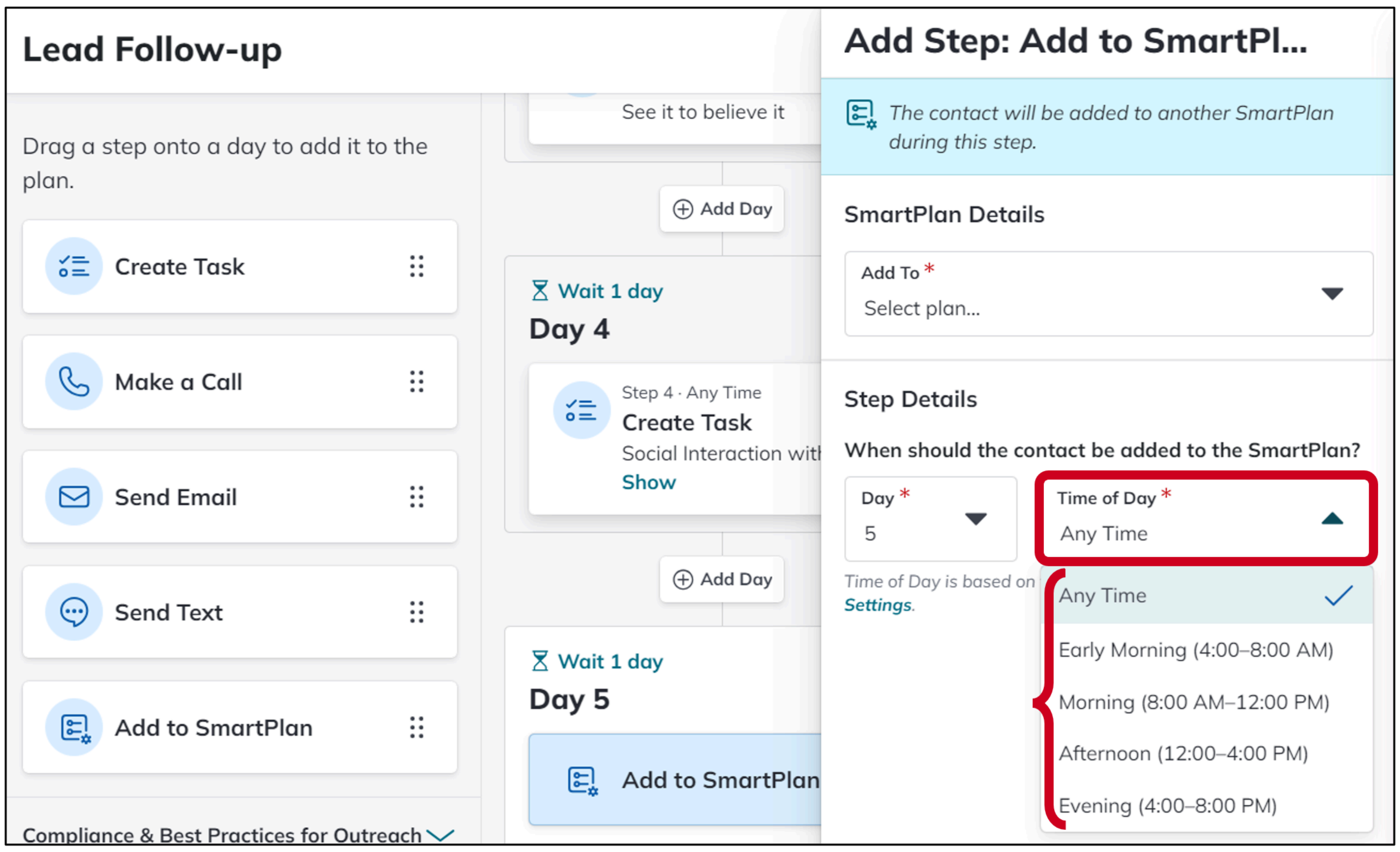


Add to SmartPlan

1. Use the "Add To" drop-down to **select the existing SmartPlan** you want to add the contact to, in this step.



2. In the "When should the contact be added to the SmartPlan?" field, select the Time of Day you want this action to take place (Any Time, Early Morning, Morning, Afternoon, Evening).



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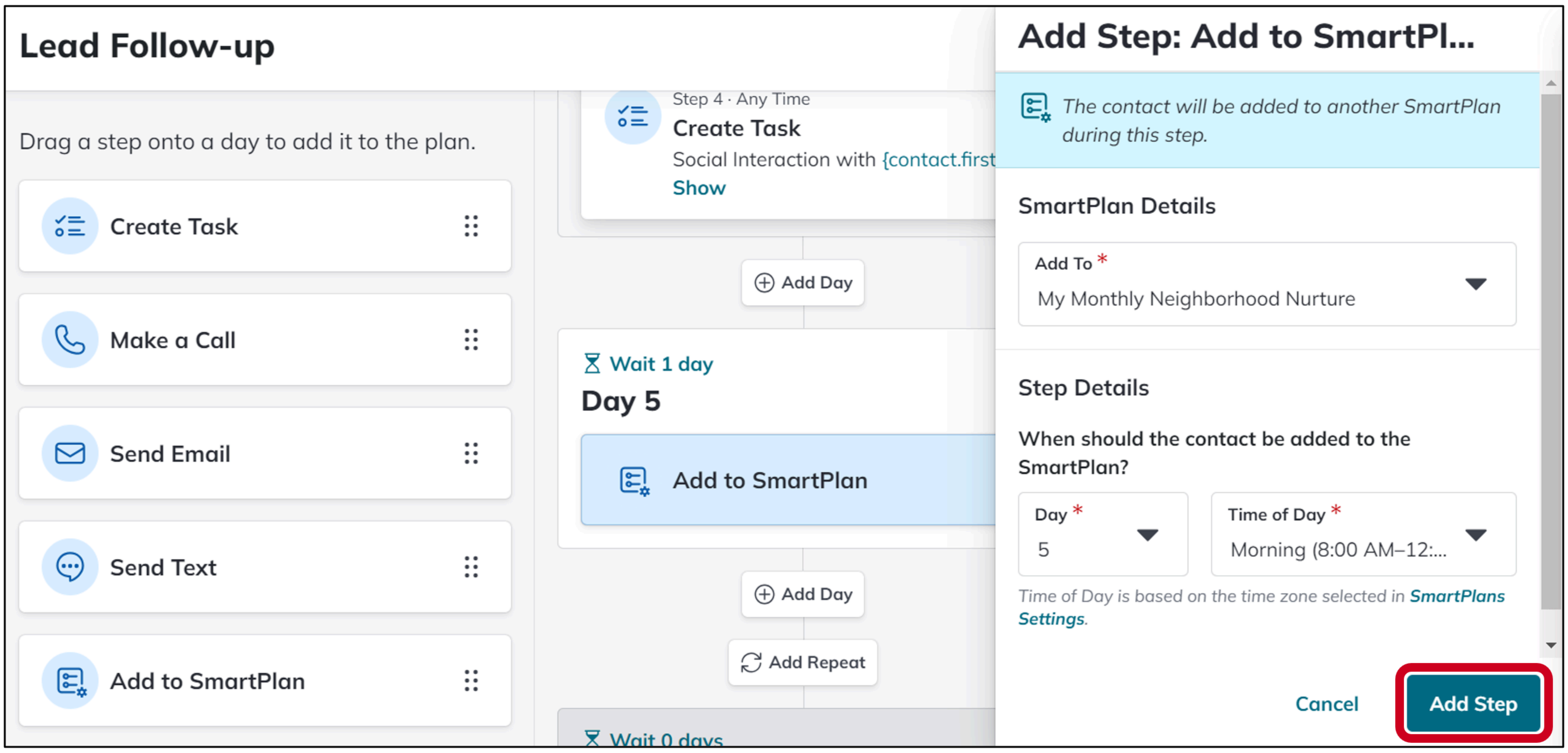


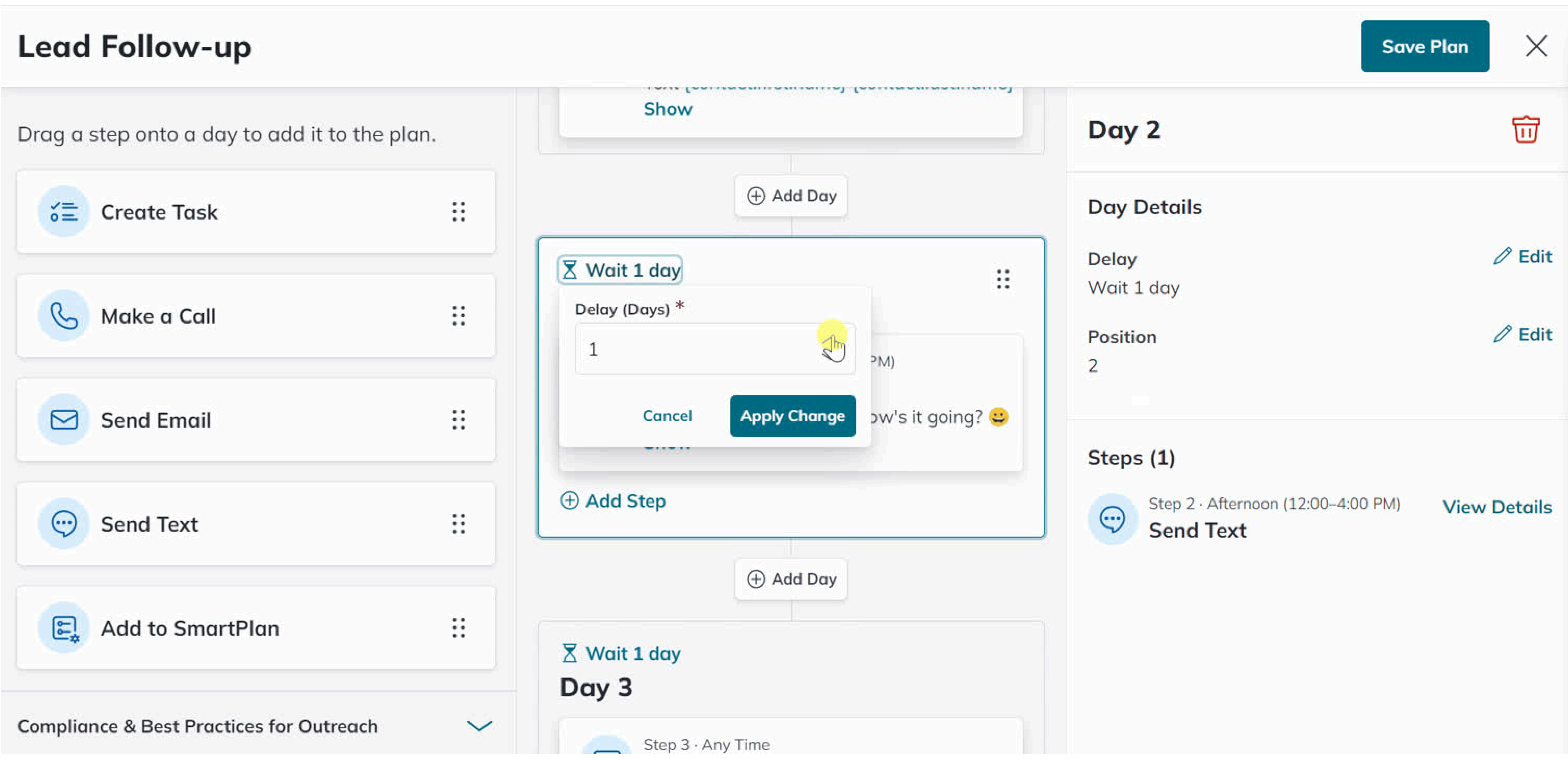
Manage the SmartPlan Schedule

1. Once you've added a step to a day, you can **click on the Day Card** to take a few actions:

- At the top left of the card, you see the **delay settings** for that day. Click to select how many days should elapse, after the previous step, before this day launches. Once you make a change, you will see the Day Number change to reflect the new schedule.

- You can click **Add Step**, at the bottom left of the card, to add another step to that day.
  - Ensure the Time of Day settings line up correctly. You will see an error if a step with a later Time of Day setting is set before a step with an earlier Time of Day setting.

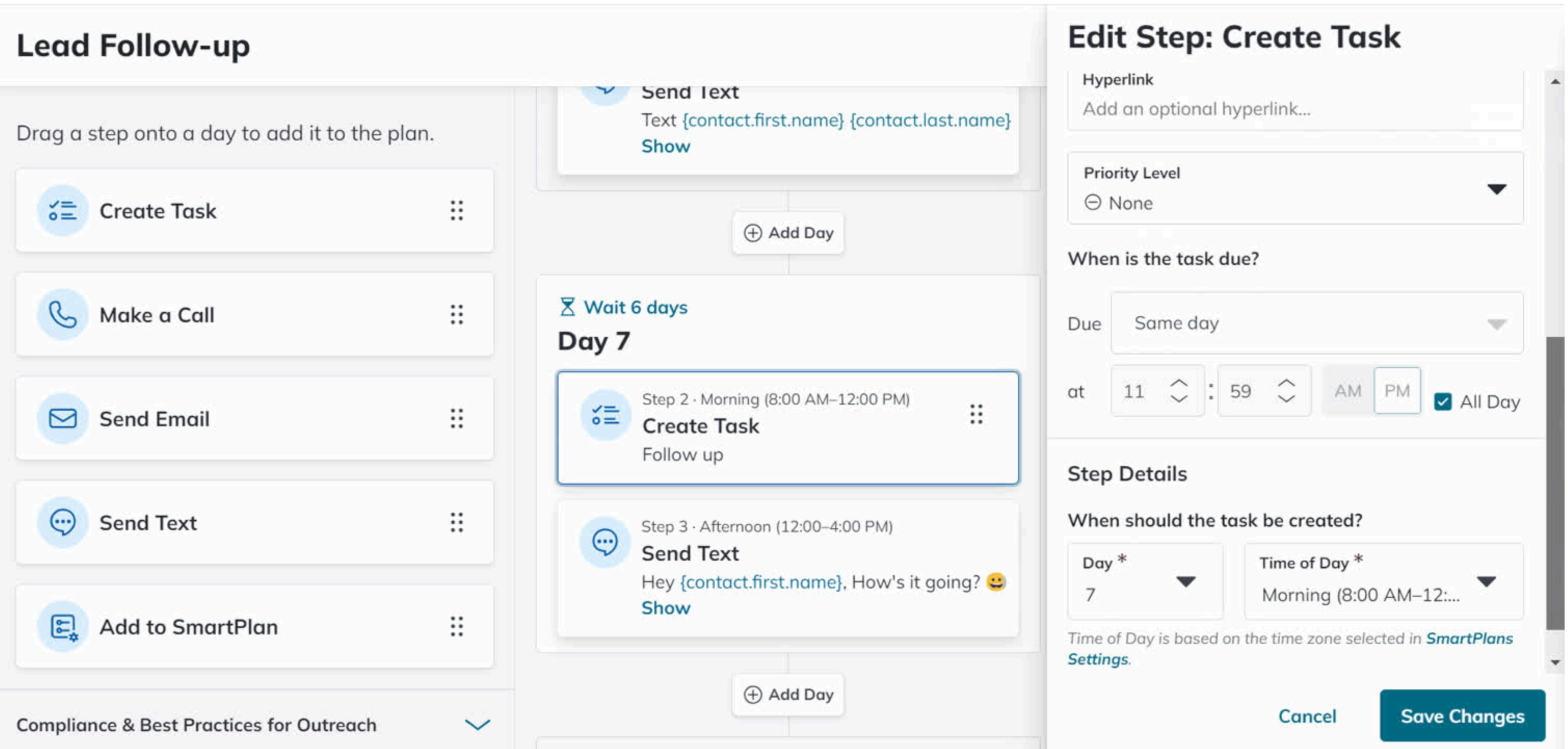
- Within the Day card, you can click and drag the steps to **reorder** them, for that day.



Edit a Step

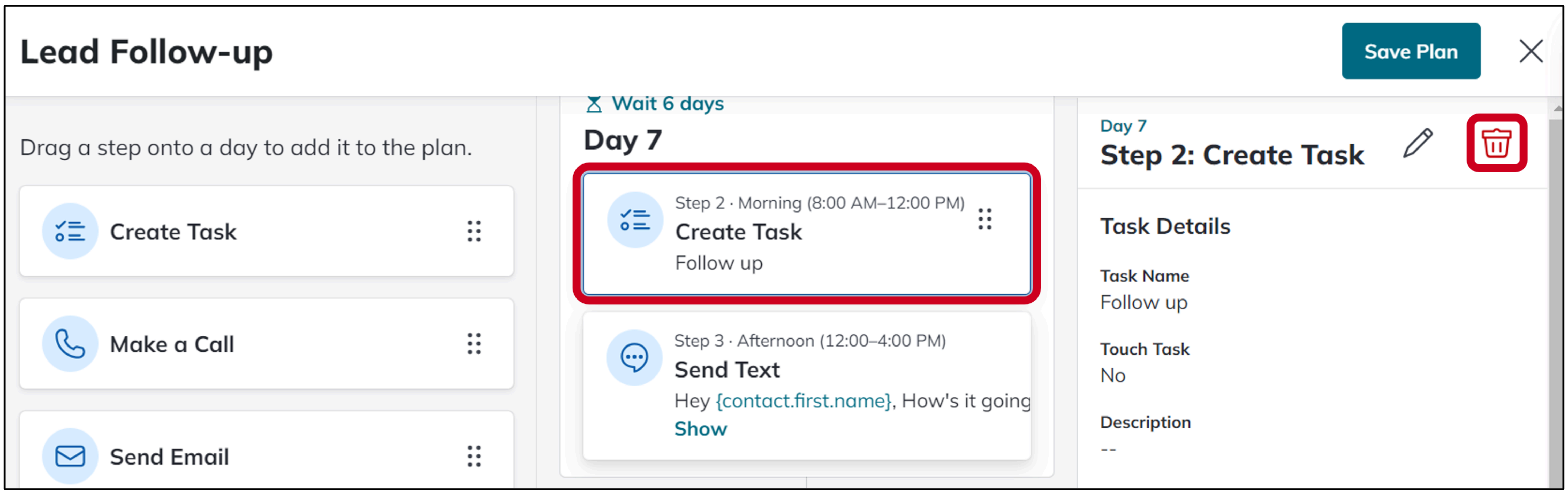
1. To edit a step, **find and click on the step** you want to edit the details for, then click the Edit icon, , at the top right of the page.

2. Make the changes, then click **Save Changes**, at the bottom right of the page.

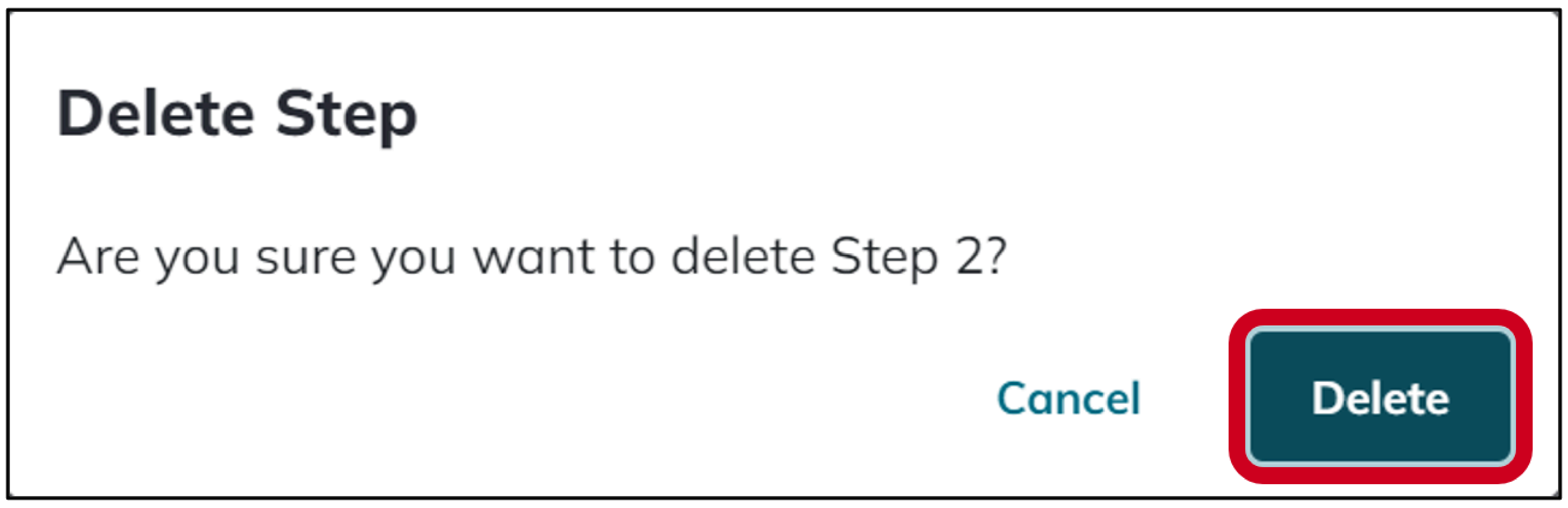


Remove Days and Steps

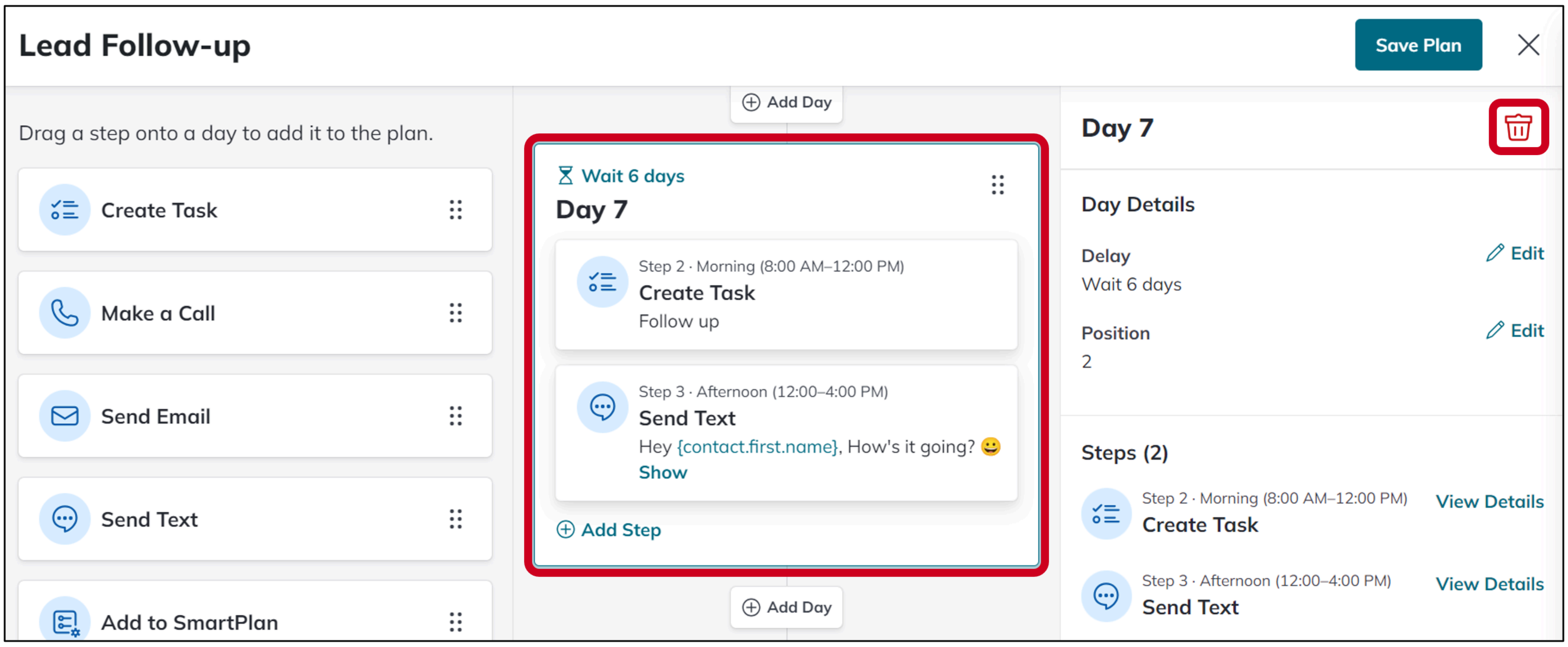
1. To remove a step, **find and click on the step** you want to remove, then click the **Delete icon**, , at the top right of the page.



2. A confirmation will appear, click **Delete**.



3. To remove an entire day, find and click on the Day card, then click the **Delete icon**, 🗑, at the top right of the page.



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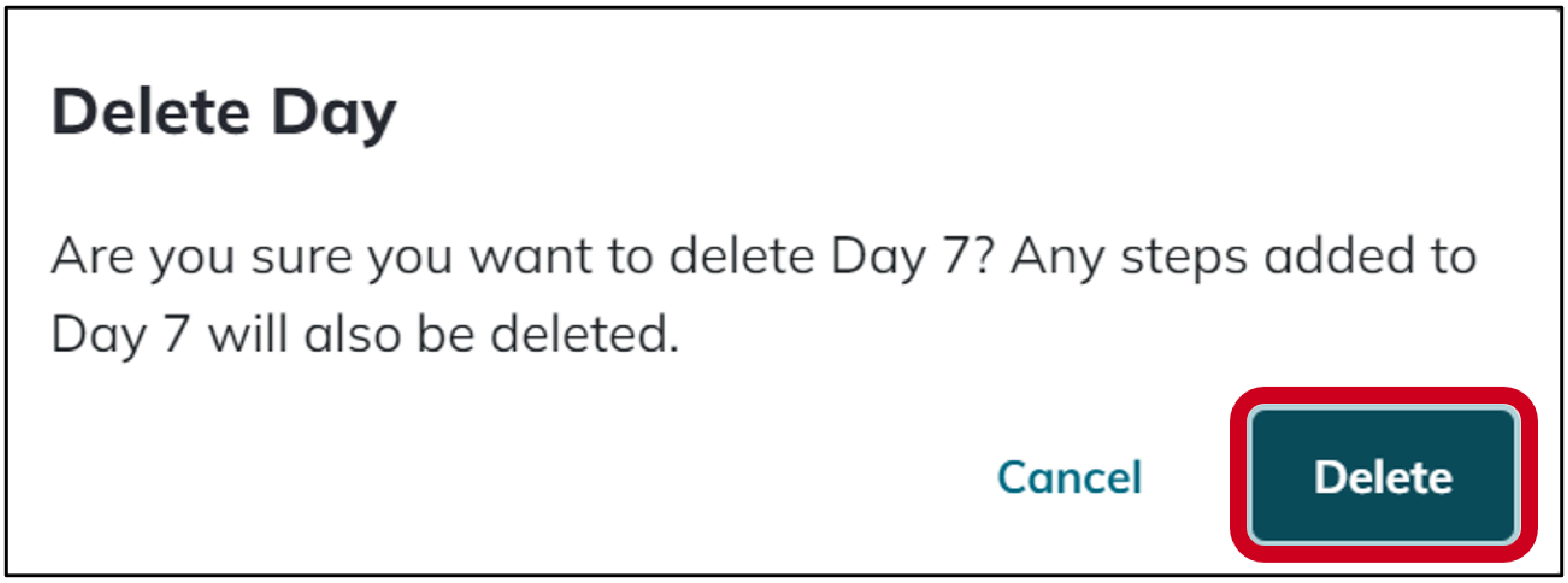
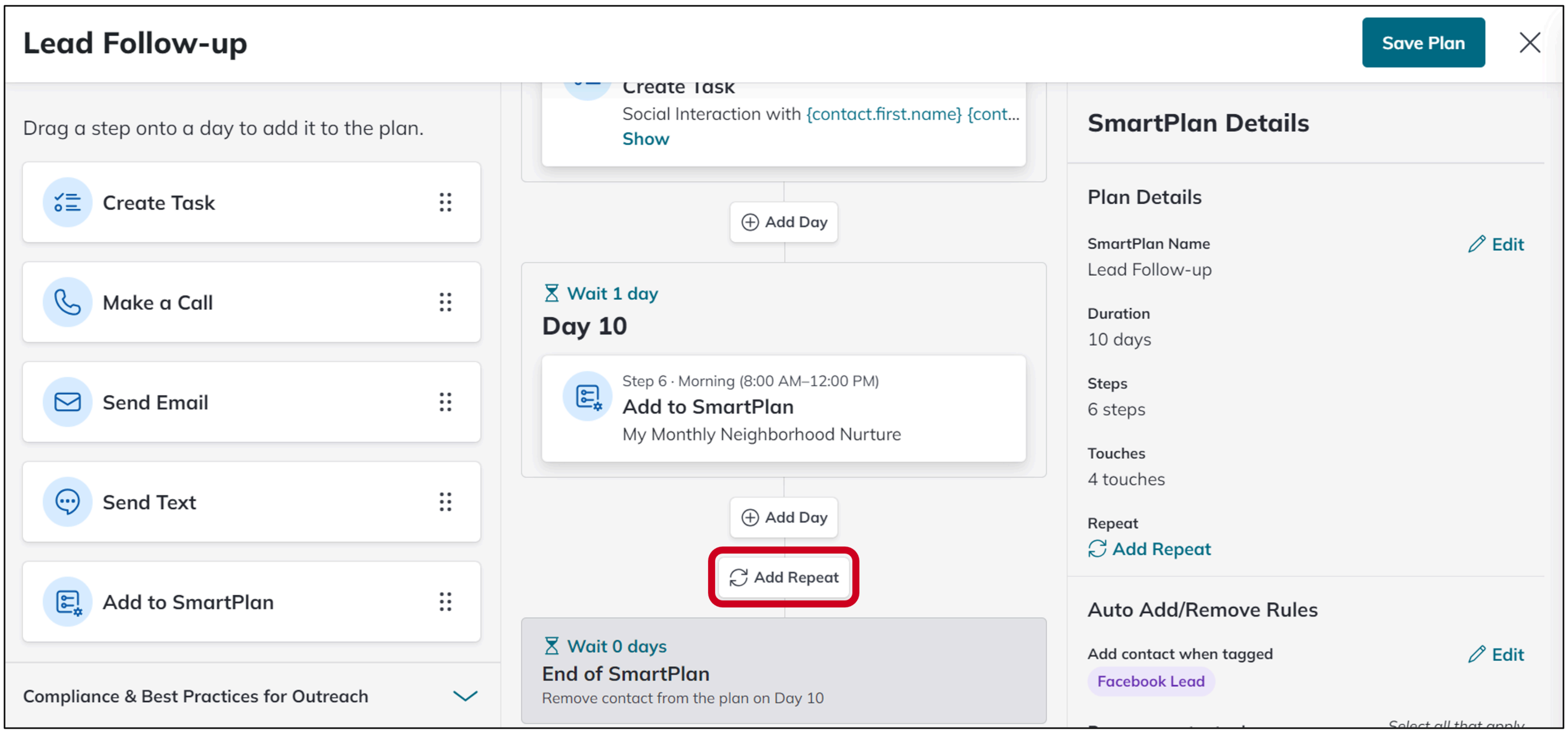
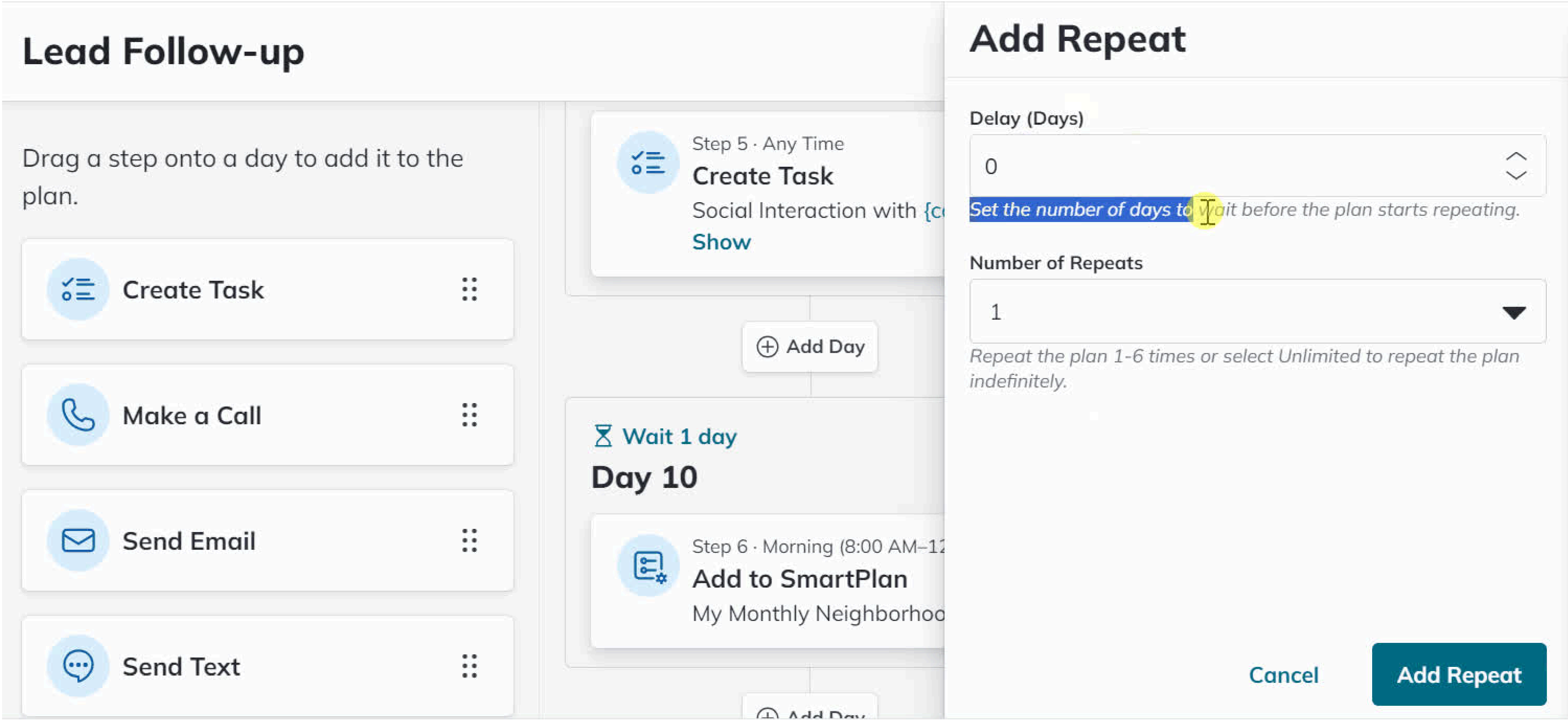


Add a Repeat (end of the SmartPlan)

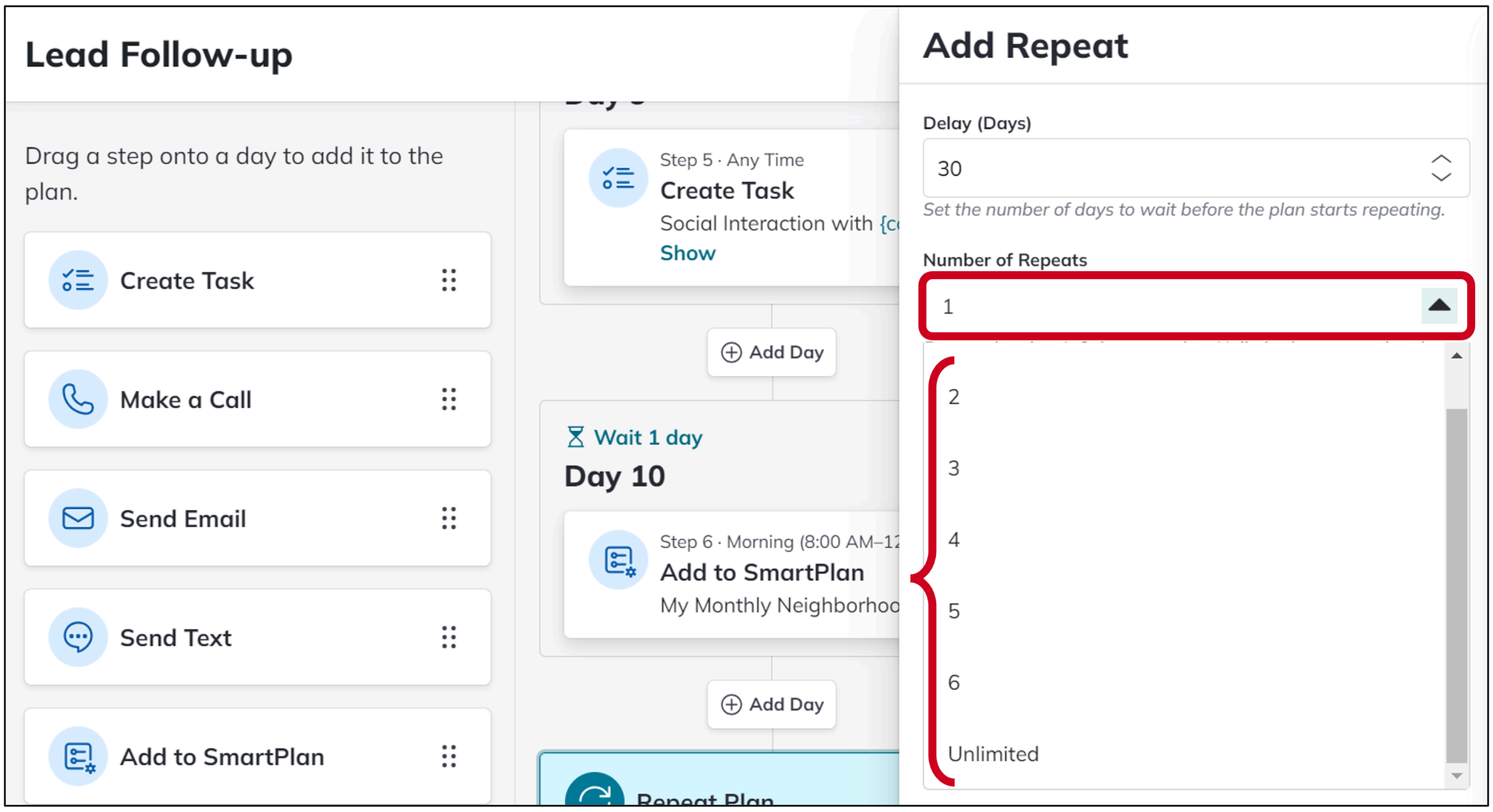
1. At the bottom of the SmartPlan workflow, click **Add Repeat.**



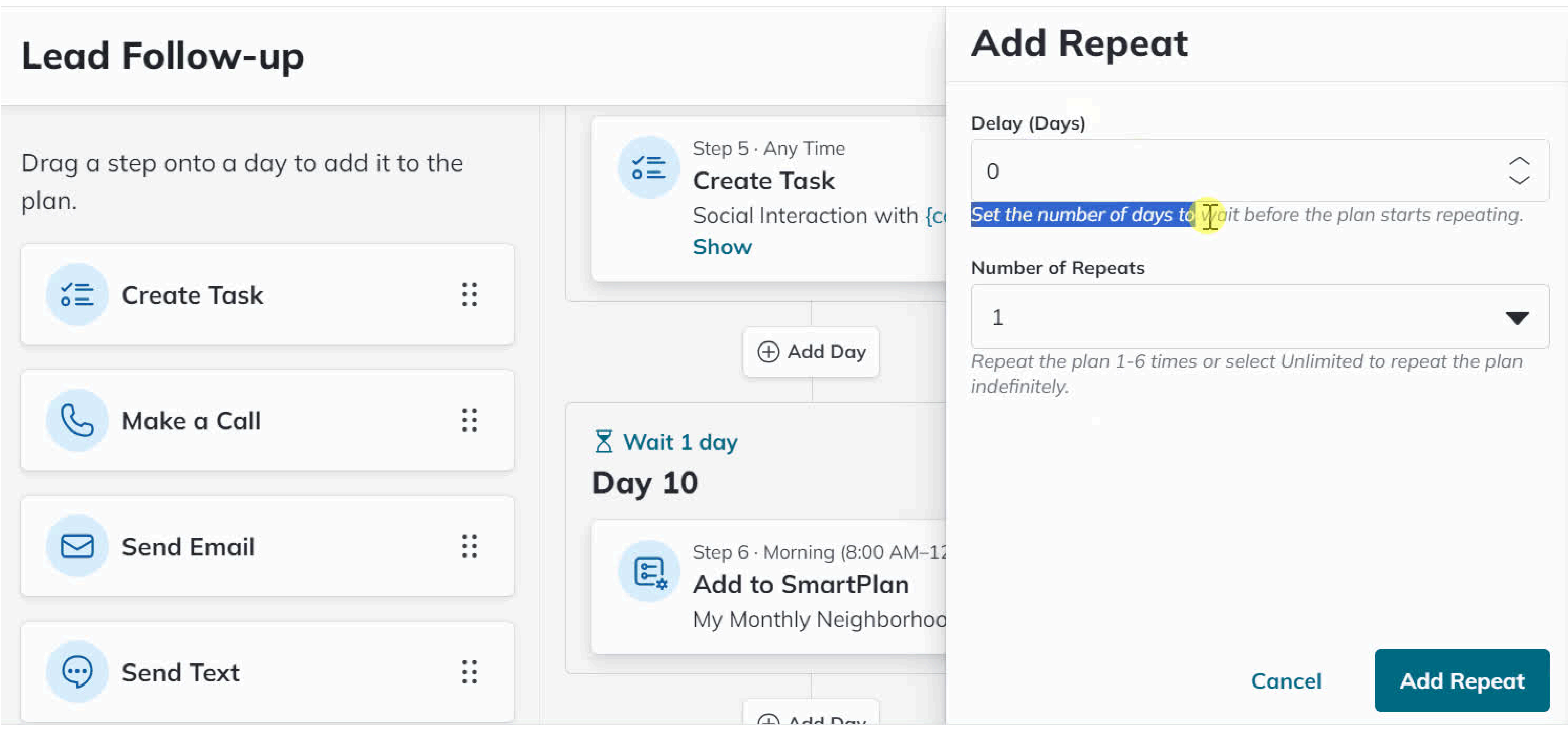
2. At the top of the "Add Repeat" panel, use the **Delay** field to set the number of days you want to wait before the plan repeats, once it gets to the end of the last step.



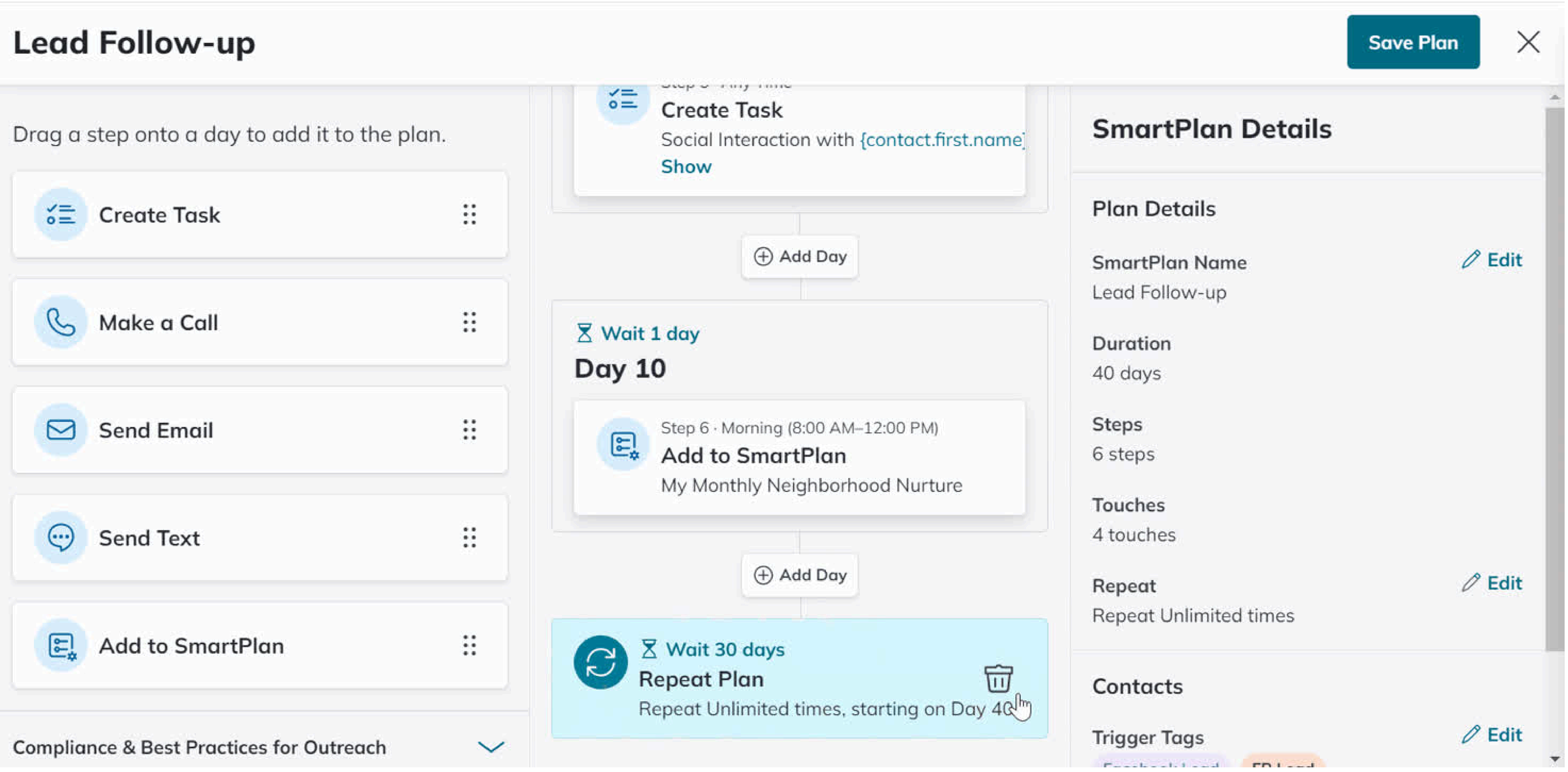
3. Use the **Number of Repeats** drop-down to select how many times you want the plan to repeat.



4. Click **Add Repeat**, at the bottom right of the page.

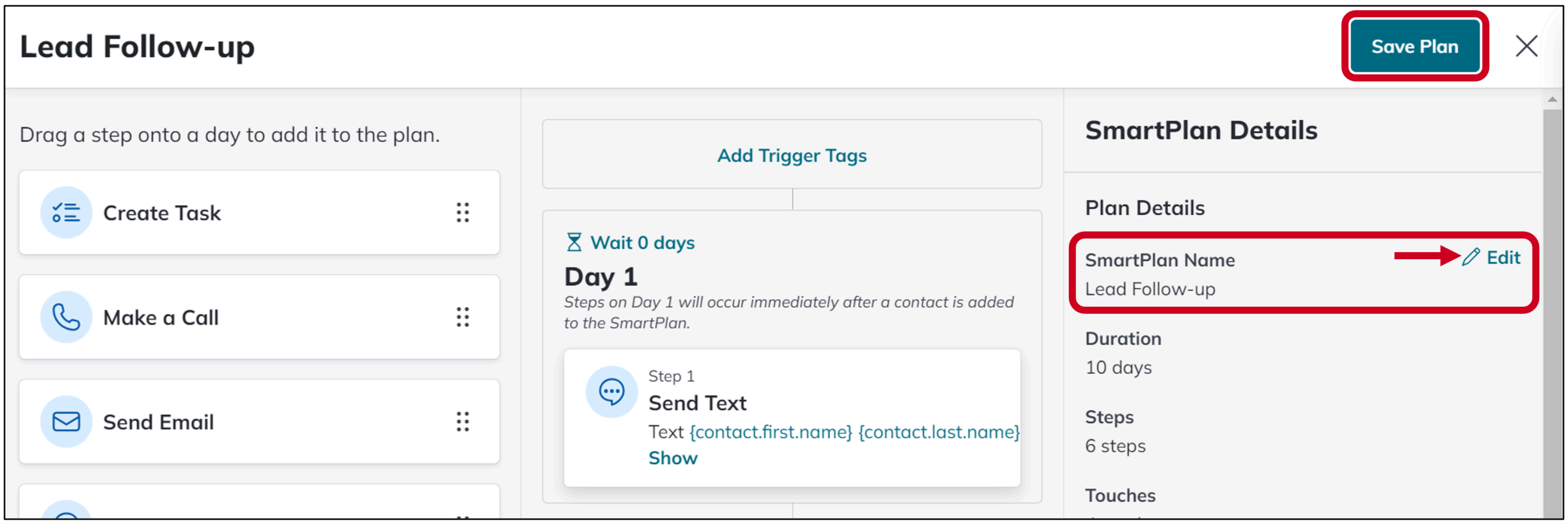


5. If you want to edit/delete the repeat settings, you can either:



Save the SmartPlan

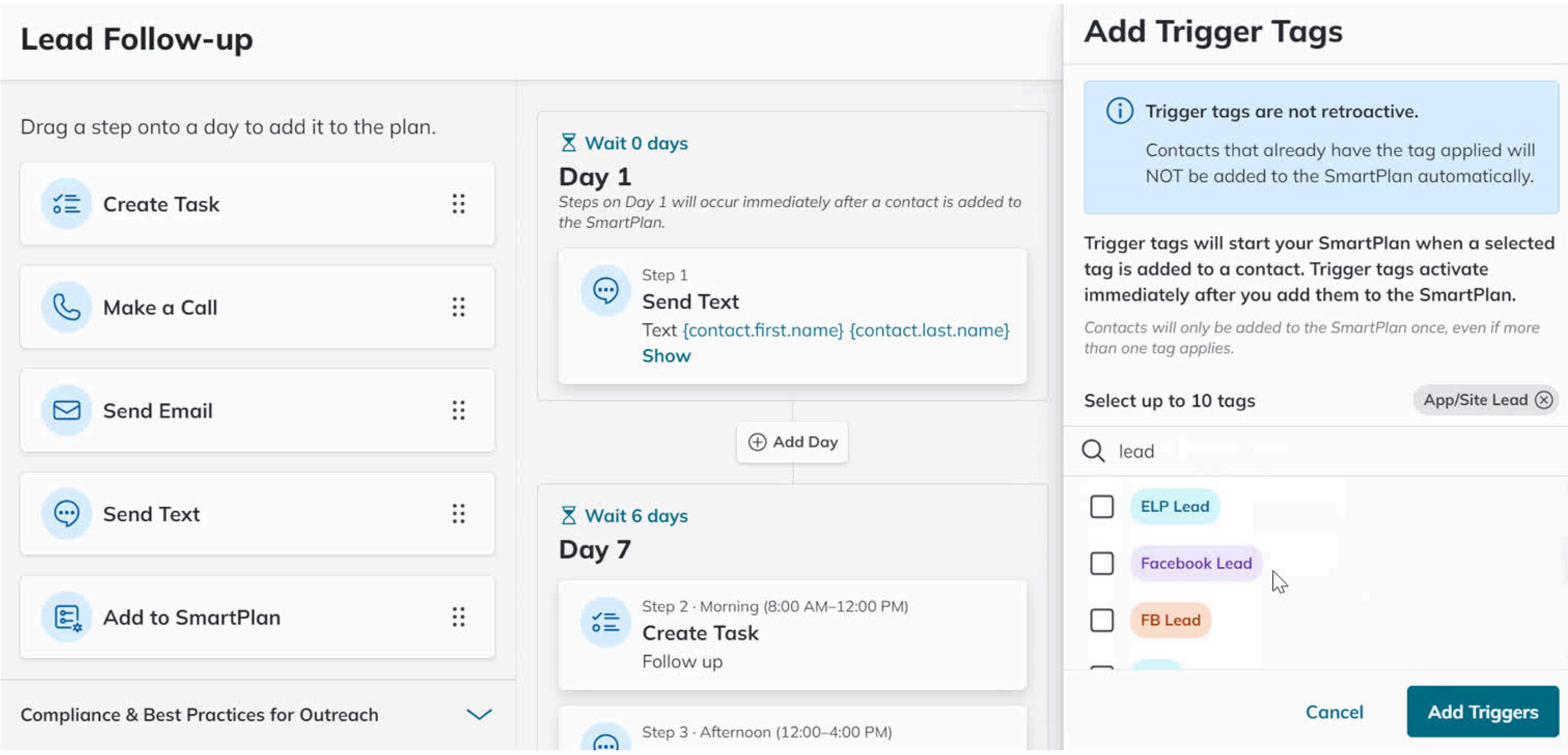
1. Once you are ready, click **Save Plan,** at the top right of the page.
    - You can edit the SmartPlan Name before saving, at the top right of the page.



Auto-Add Rules (Trigger Contact Tags)

1. In the Auto Add/Remove Rules section, at the bottom right of the edit screen (under where it says "Add contact when tagged"), click **Add Trigger Tags**, then **select the tags** you want to be a trigger and click **Add Triggers**.

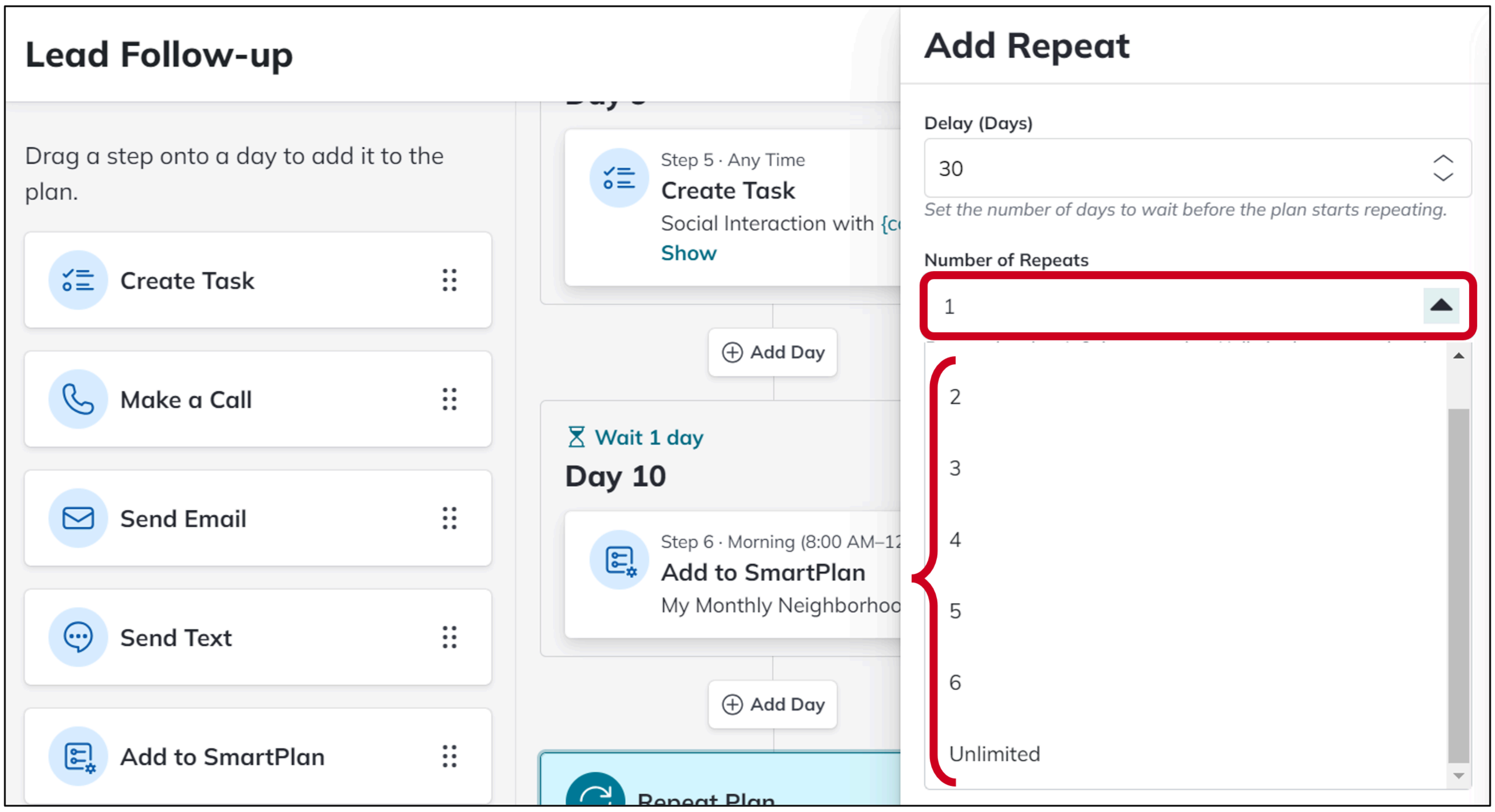
2. Once you have added tags here, you can click **Edit**, to the right of where it says "Add contact when tagged," make changes to the selected tags, and click **Apply Changes**.



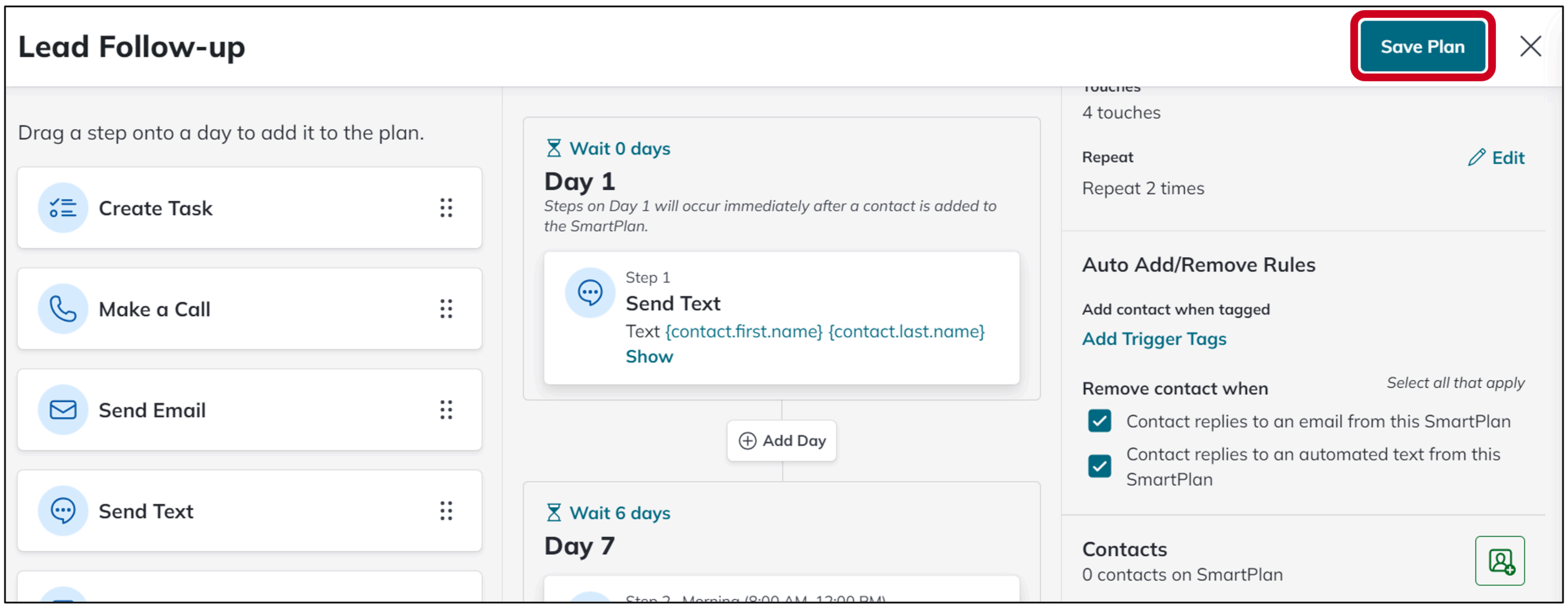
3. Ensure you **<u>save the plan</u>**, once you finalize the Trigger Contact Tags you want to add.

Auto-Removal Rules

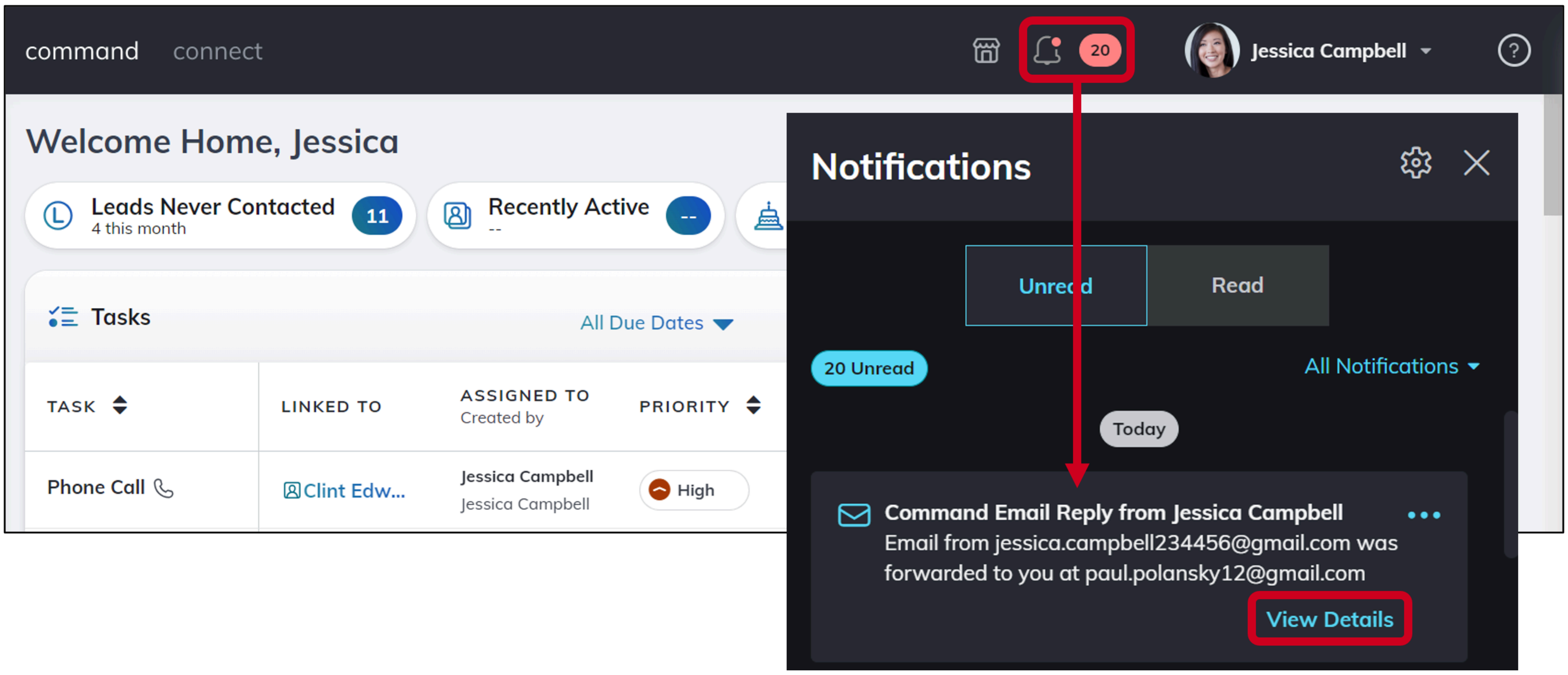
1. In the Auto Add/Remove Rules section, at the bottom right of the edit screen (under where it says "Remove contact when"), select the checkbox(es) for all of the conditions you want to apply to the Removal Rules section:



2. Ensure you **save the plan**, once you make your selection.



When someone responds to an email or text (and you have that selected as a Remove Rule), you won't get a notification about the removal, but you will get a notification about the response. Click in the notification to access the contact's timeline:



Once in the timeline, you will see the email received and the SmartPlan removal. From here you can click to create an Opportunity, add to another SmartPlan, or any other action you need to take now that they are not on that SmartPlan.