



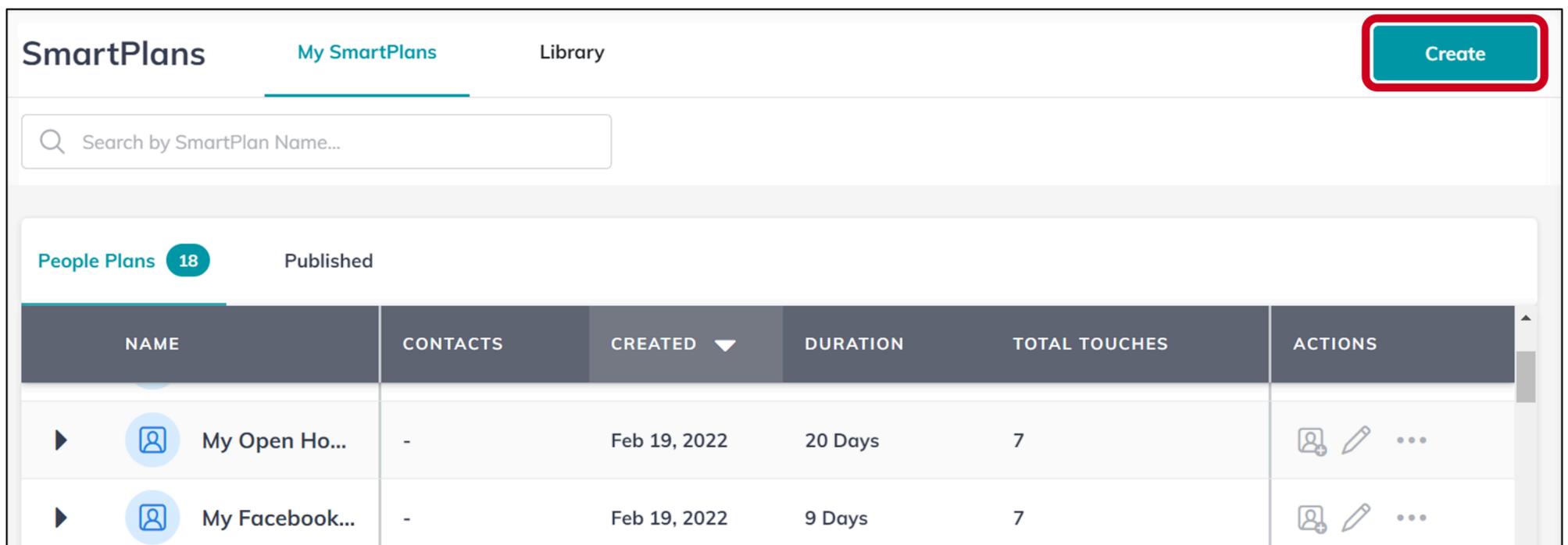
Command Quick Guides

Your Guide to Command:
*Create a Custom
Smartplan*



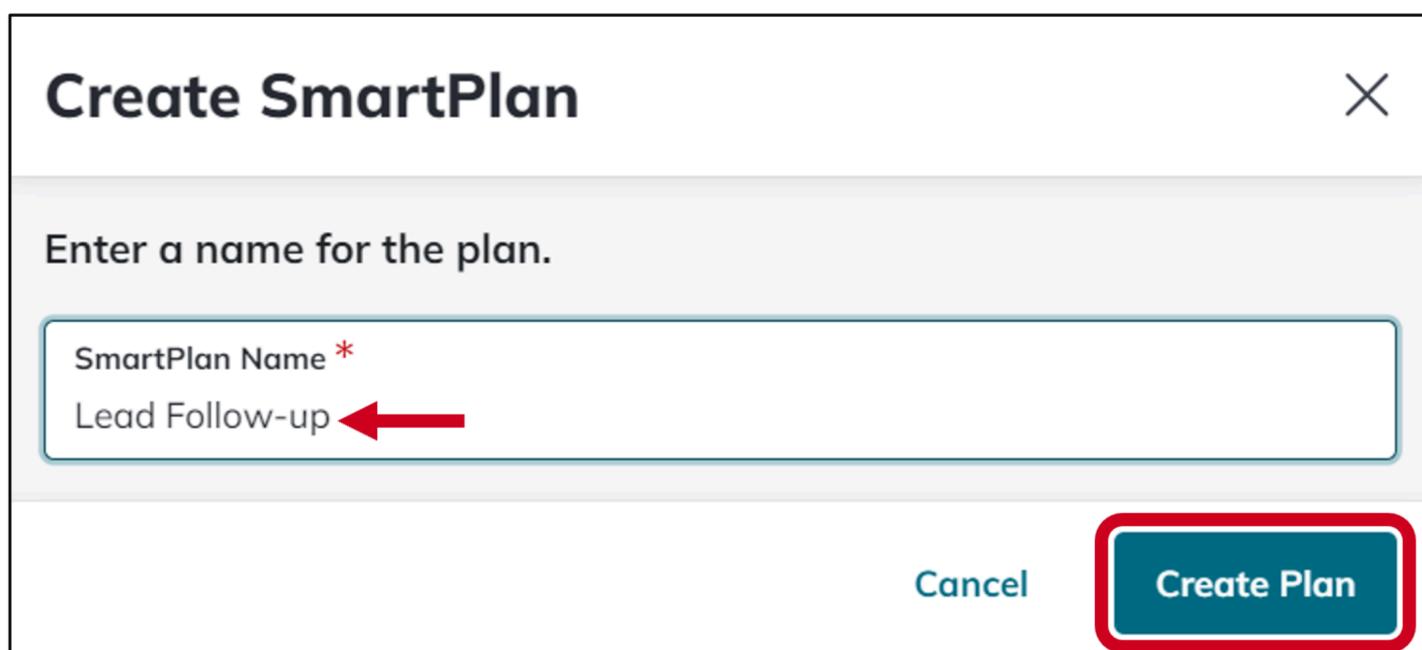
Access

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

A screenshot of the SmartPlans dashboard. At the top, there are tabs for 'SmartPlans', 'My SmartPlans', and 'Library'. A 'Create' button is highlighted with a red box in the top right corner. Below the tabs is a search bar labeled 'Search by SmartPlan Name...'. The main content area shows 'People Plans' with a count of 18 and a 'Published' filter. A table lists two plans: 'My Open Ho...' and 'My Facebook...'. The table has columns for NAME, CONTACTS, CREATED, DURATION, TOTAL TOUCHES, and ACTIONS.

NAME	CONTACTS	CREATED	DURATION	TOTAL TOUCHES	ACTIONS
▶  My Open Ho...	-	Feb 19, 2022	20 Days	7	  ...
▶  My Facebook...	-	Feb 19, 2022	9 Days	7	  ...

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

A dialog box titled 'Create SmartPlan' with a close button (X) in the top right corner. The text inside says 'Enter a name for the plan.' Below this is a text input field with the label 'SmartPlan Name *' and the text 'Lead Follow-up' entered. A red arrow points to the text 'Lead Follow-up'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Create Plan', with the 'Create Plan' button highlighted by a red box.

Enter a name for the plan.

SmartPlan Name *
Lead Follow-up

Cancel Create Plan



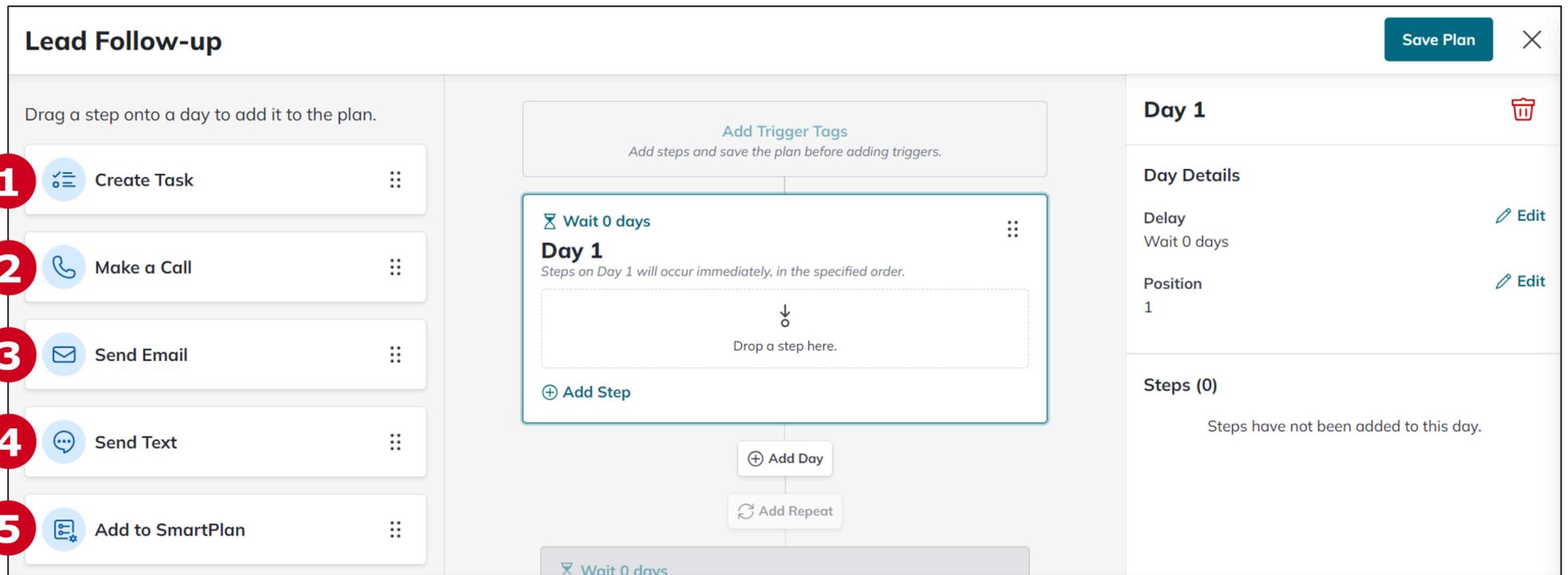
Add Days and Steps

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:

The screenshot shows the 'Lead Follow-up' interface. On the left, a list of steps is available: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. A 'Create Task' step is being dragged from this list to the 'Day 1' section. The 'Day 1' section is titled 'Wait 0 days' and contains a single step: 'Step 1 Send Text' with the text '{contact.first.name} {contact.last.name}'. Below 'Day 1' is 'Day 2', titled 'Wait 1 day', which is currently empty. On the right, the 'SmartPlan Details' panel shows the plan name 'Wait 1 day' and its position '2'. A 'Save Plan' button is visible in the top right corner.

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:

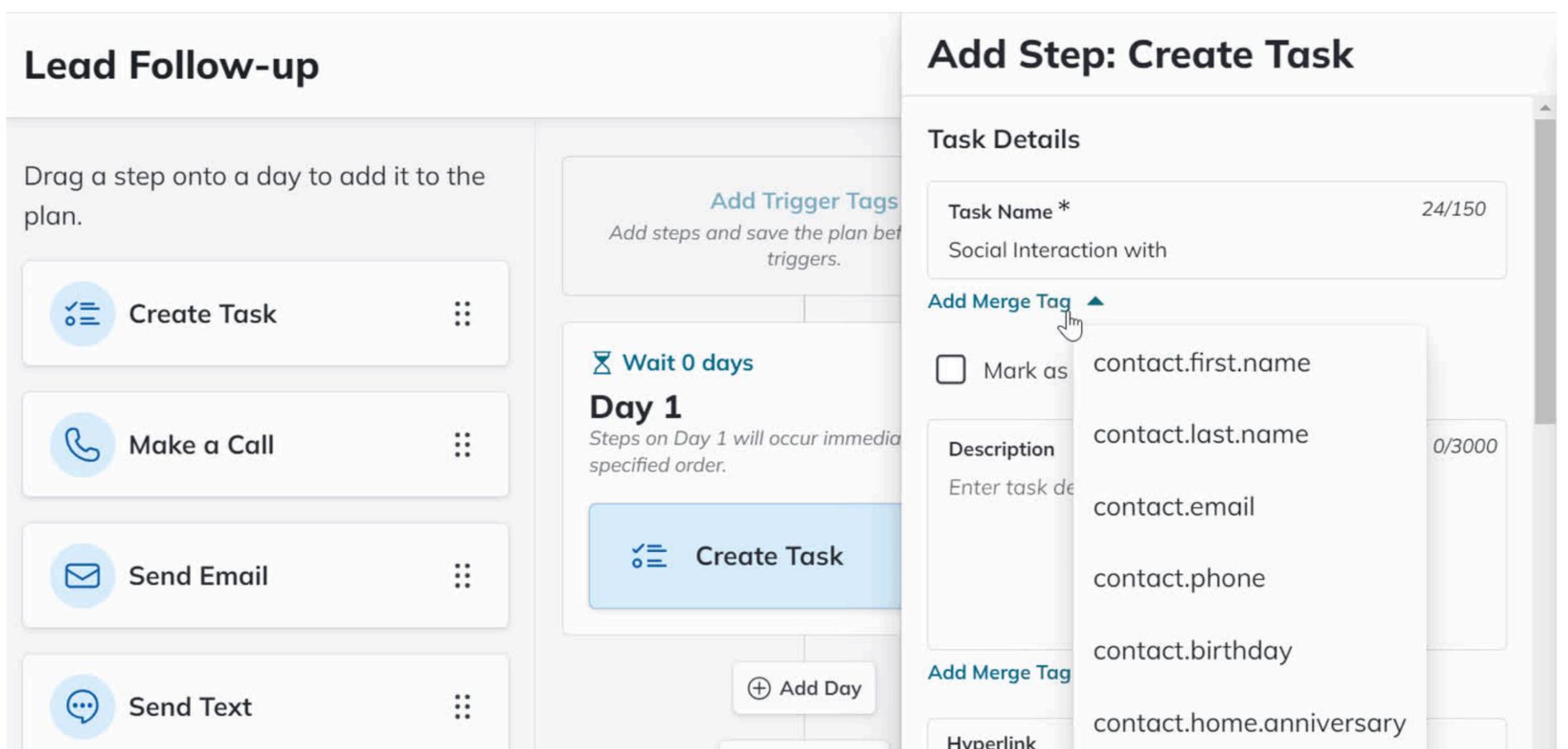
- Create Task
- Make a Call
- Send Email
- Send Text
- Add to SmartPlan



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.

Lead Follow-up

Drag a step onto a day to add it to the plan.

- Create Task
- Make a Call

Add Step: Create Task

Mark as Touch Task

Description 182/3000

Reach out through social media and interact with {contact.first.name} {contact.last.name} in a personalized way.

Tip: access their social profiles through the linked

Add Merge Tag ▼

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

Lead Follow-up

Drag a step onto a day to add it to the plan.

- Create Task
- Make a Call
- Send Email
- Send Text

Add Step: Create Task

Add Merge Tag ▼

Hyperlink

<https://docs.google.com/spreadsheets/d/1HAMdYsC>

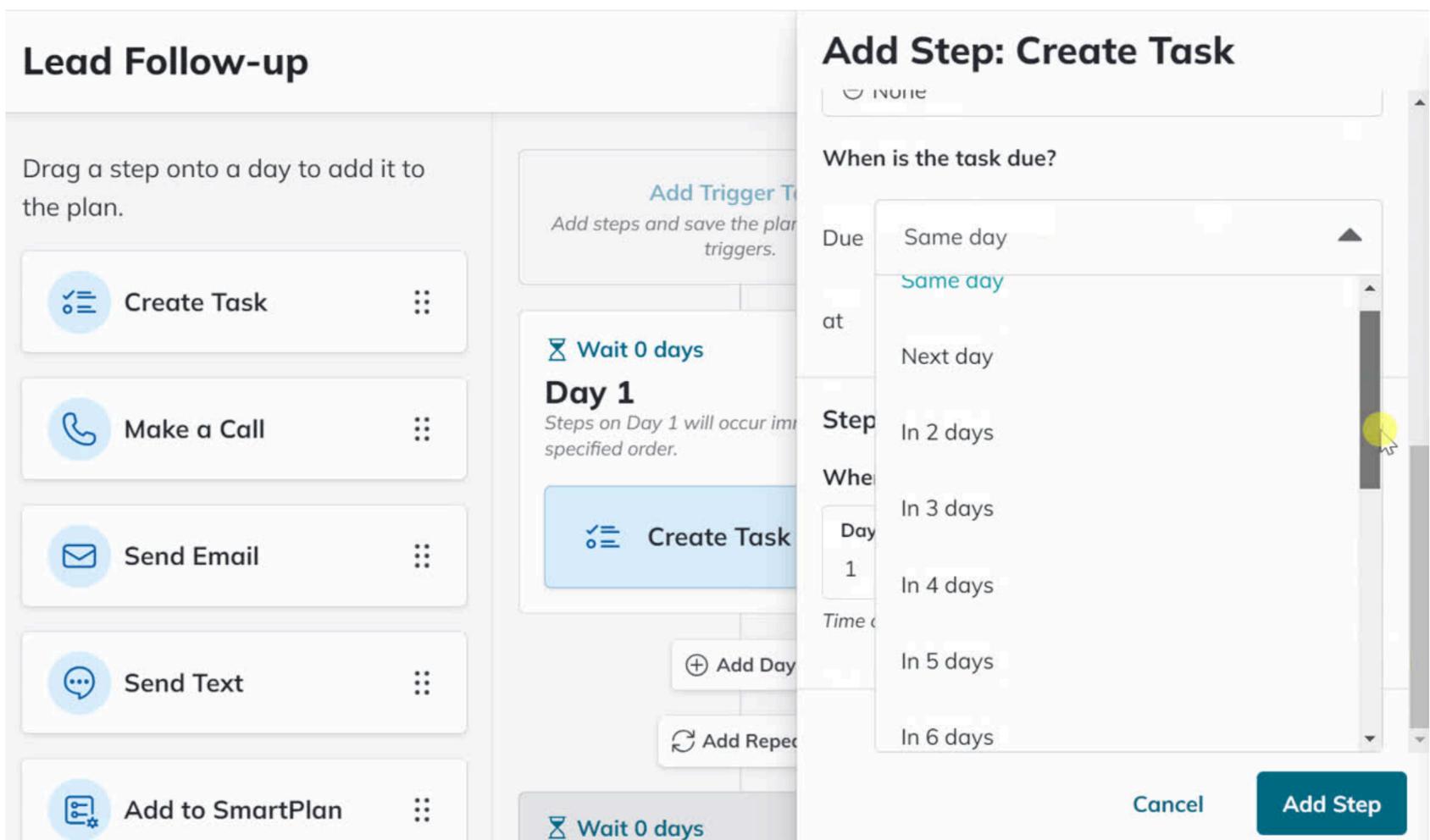
Priority Level

⊖ None

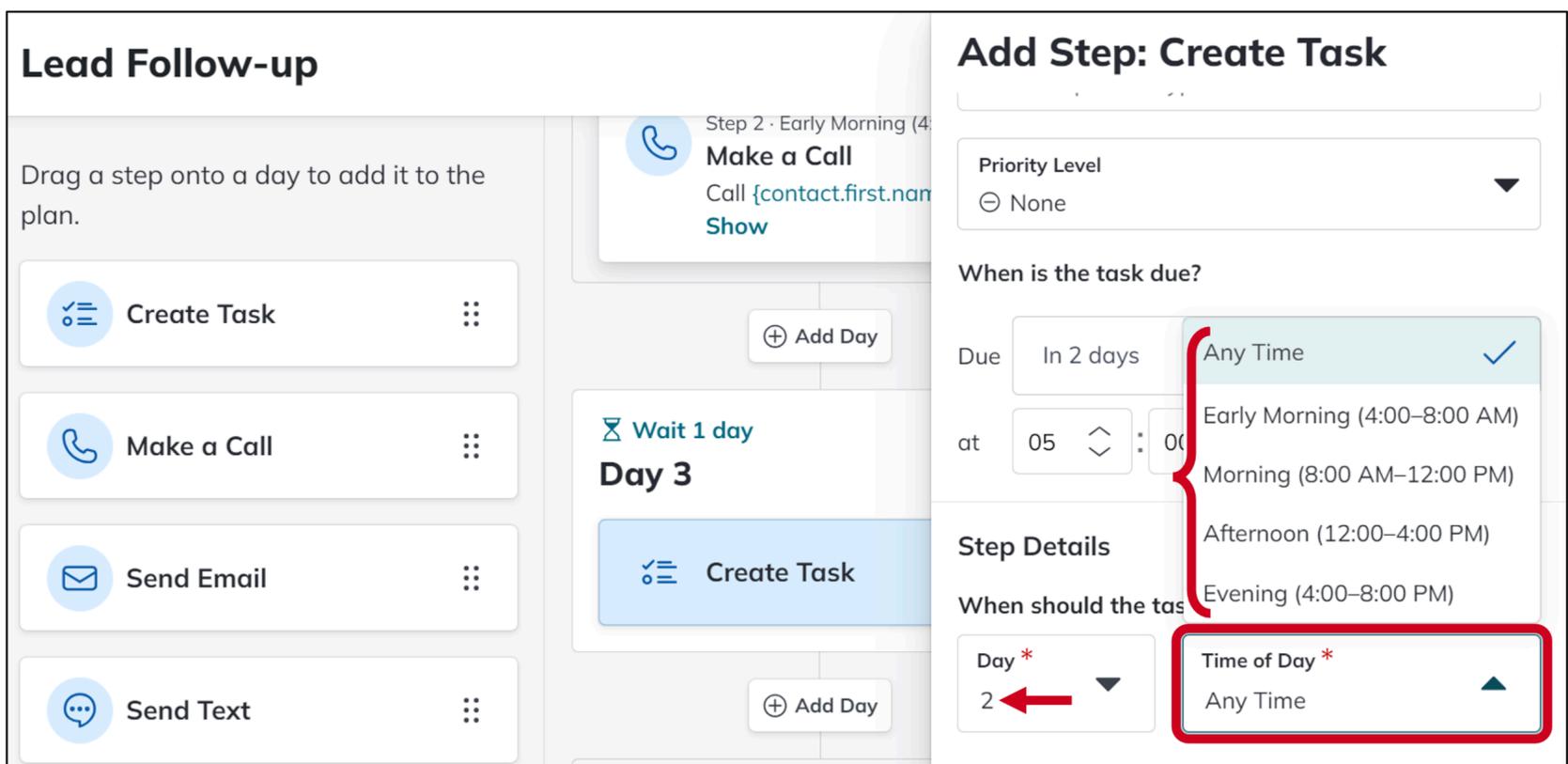
- ⊖ None
- ⊕ High
- ⊖ Medium
- ⊖ Low



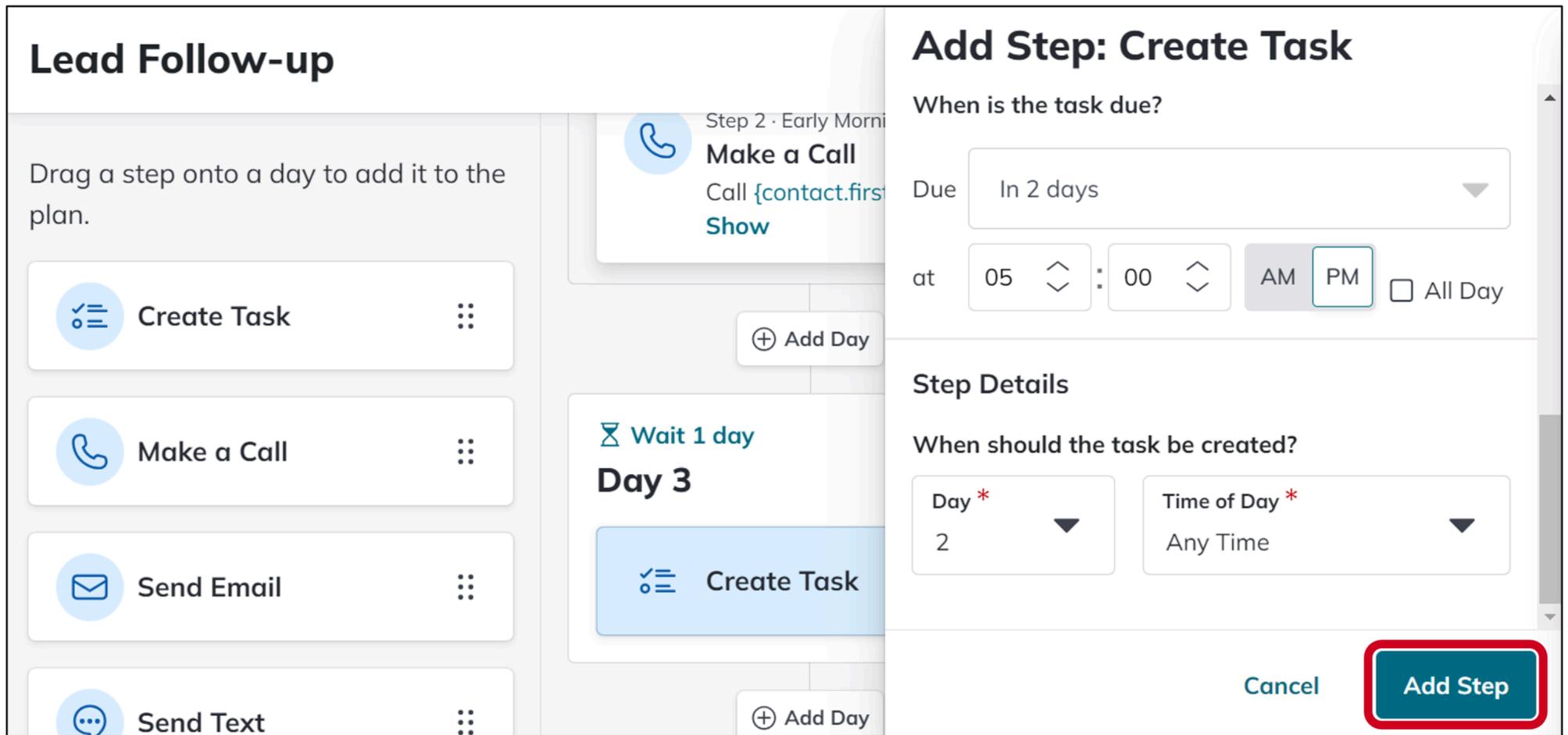
4. the "When is the task due?" field, select how you want the **due date of the task** handled. Once the task populates, use the drop-down to select when it should be due (from Same Day to 14 days) and then select what time you want the task to be due.



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

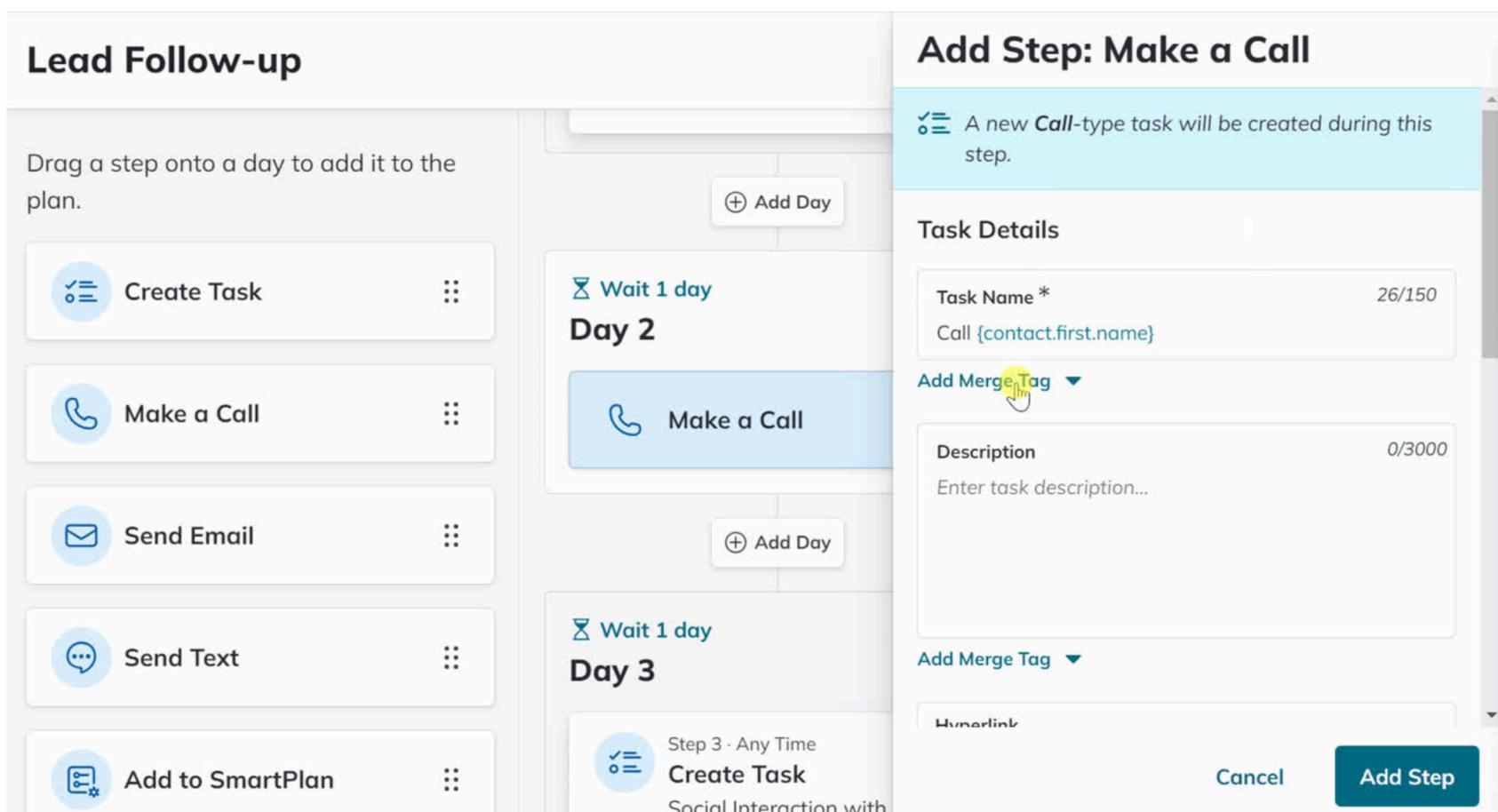


6. Click **Add Step**, at the bottom right of the page.

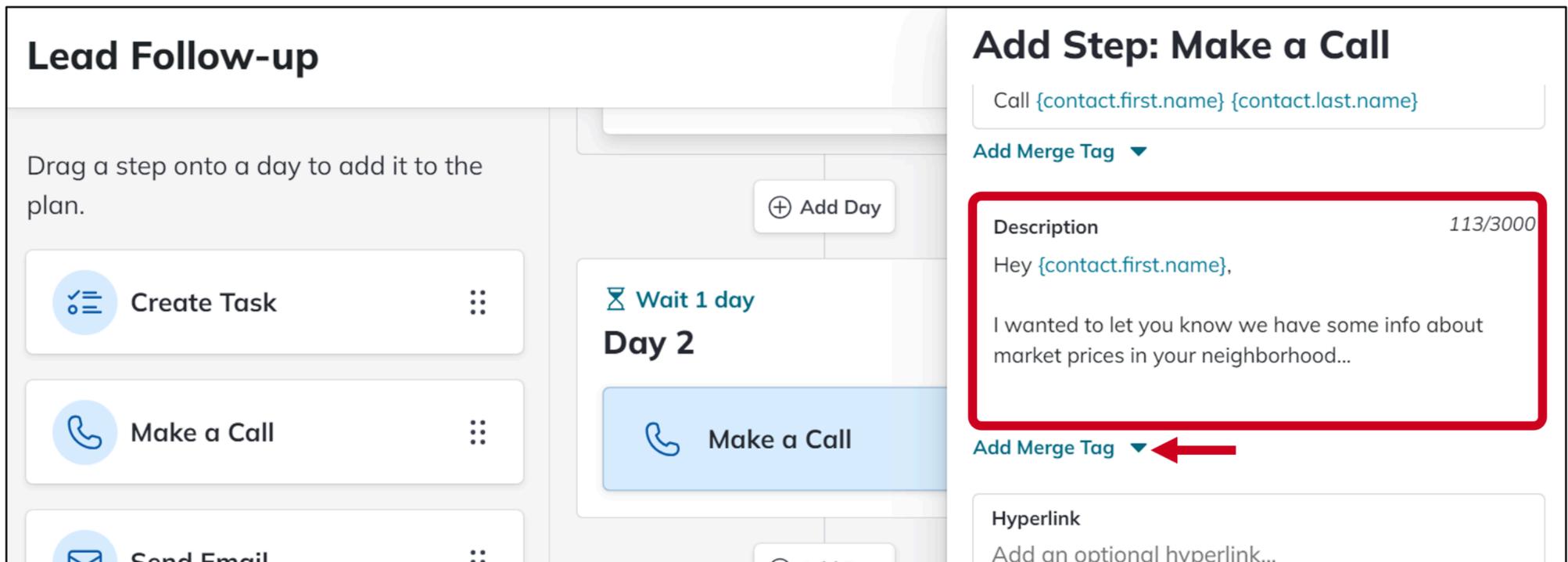
This screenshot shows the 'Add Step: Create Task' dialog box overlaid on a 'Lead Follow-up' plan. The dialog box is titled 'Add Step: Create Task' and contains several sections. At the top, it asks 'When is the task due?' with a dropdown menu set to 'In 2 days'. Below this, it asks 'at' with a time selector set to '05 : 00' and 'AM' selected, and an 'All Day' checkbox. The 'Step Details' section asks 'When should the task be created?' with a 'Day' dropdown set to '2' and a 'Time of Day' dropdown set to 'Any Time'. At the bottom right, there are 'Cancel' and 'Add Step' buttons, with the 'Add Step' button highlighted by a red rectangle.

Create Task

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

This screenshot shows the 'Add Step: Make a Call' dialog box overlaid on a 'Lead Follow-up' plan. The dialog box is titled 'Add Step: Make a Call' and contains several sections. At the top, there is a light blue banner that says 'A new Call-type task will be created during this step.' Below this, the 'Task Details' section has a 'Task Name' field with a value of 'Call {contact.first.name}' and a character count of '26/150'. There is an 'Add Merge Tag' button with a dropdown arrow. Below that is a 'Description' field with a value of 'Enter task description...' and a character count of '0/3000'. There is another 'Add Merge Tag' button with a dropdown arrow. At the bottom, there is a 'Hyperlink' field and 'Cancel' and 'Add Step' buttons.

2. Enter a **Task Description**.

This screenshot shows the 'Add Step: Make a Call' configuration interface. On the left, a 'Lead Follow-up' plan is visible with a 'Day 2' section containing a 'Make a Call' task. The right-hand panel is titled 'Add Step: Make a Call' and contains several fields: a title field with the text 'Call {contact.first.name} {contact.last.name}', an 'Add Merge Tag' dropdown, a 'Description' field with a character count of '113/3000' containing the text 'Hey {contact.first.name}, I wanted to let you know we have some info about market prices in your neighborhood...', another 'Add Merge Tag' dropdown with a red arrow pointing to it, and a 'Hyperlink' field with the placeholder text 'Add an optional hyperlink...'.

Lead Follow-up

Drag a step onto a day to add it to the plan.

⊕ Add Day

⌵ Wait 1 day
Day 2

☎ Make a Call

Add Step: Make a Call

Call {contact.first.name} {contact.last.name}

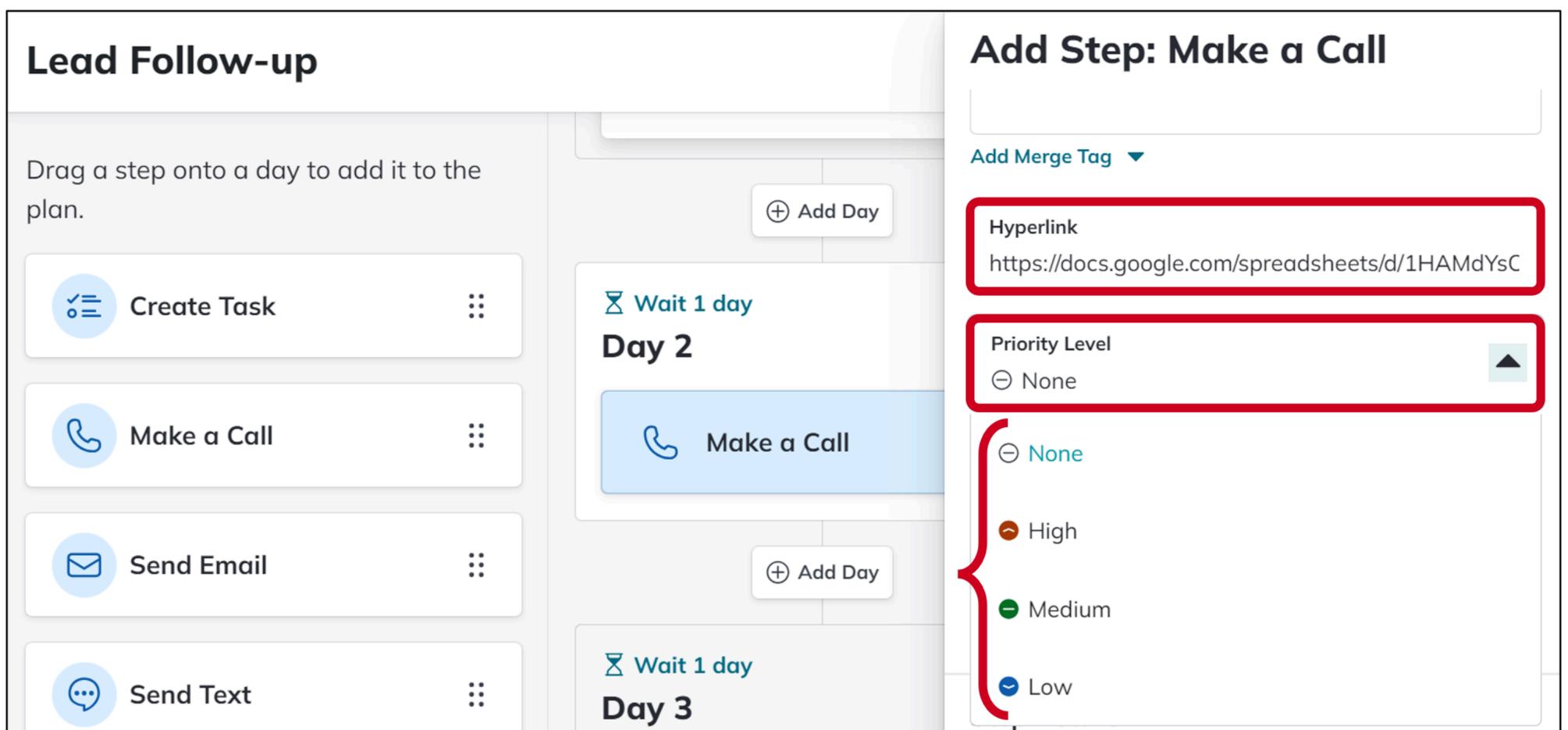
Add Merge Tag ▼

Description 113/3000
Hey {contact.first.name},
I wanted to let you know we have some info about market prices in your neighborhood...

Add Merge Tag ▼

Hyperlink
Add an optional hyperlink...

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

This screenshot shows the 'Add Step: Make a Call' configuration interface, similar to the previous one but with additional fields highlighted. The 'Hyperlink' field now contains the URL 'https://docs.google.com/spreadsheets/d/1HAMdYsC'. The 'Priority Level' dropdown is expanded, showing options: 'None', 'High', 'Medium', and 'Low'. The 'None' option is selected, and a red bracket groups the 'High', 'Medium', and 'Low' options. The 'Lead Follow-up' plan on the left now includes a 'Day 3' section with another 'Make a Call' task.

Lead Follow-up

Drag a step onto a day to add it to the plan.

⊕ Add Day

⌵ Wait 1 day
Day 2

☎ Make a Call

⊕ Add Day

⌵ Wait 1 day
Day 3

☎ Make a Call

Add Step: Make a Call

Hyperlink
<https://docs.google.com/spreadsheets/d/1HAMdYsC>

Add Merge Tag ▼

Priority Level ▲

⊖ None

⊖ None

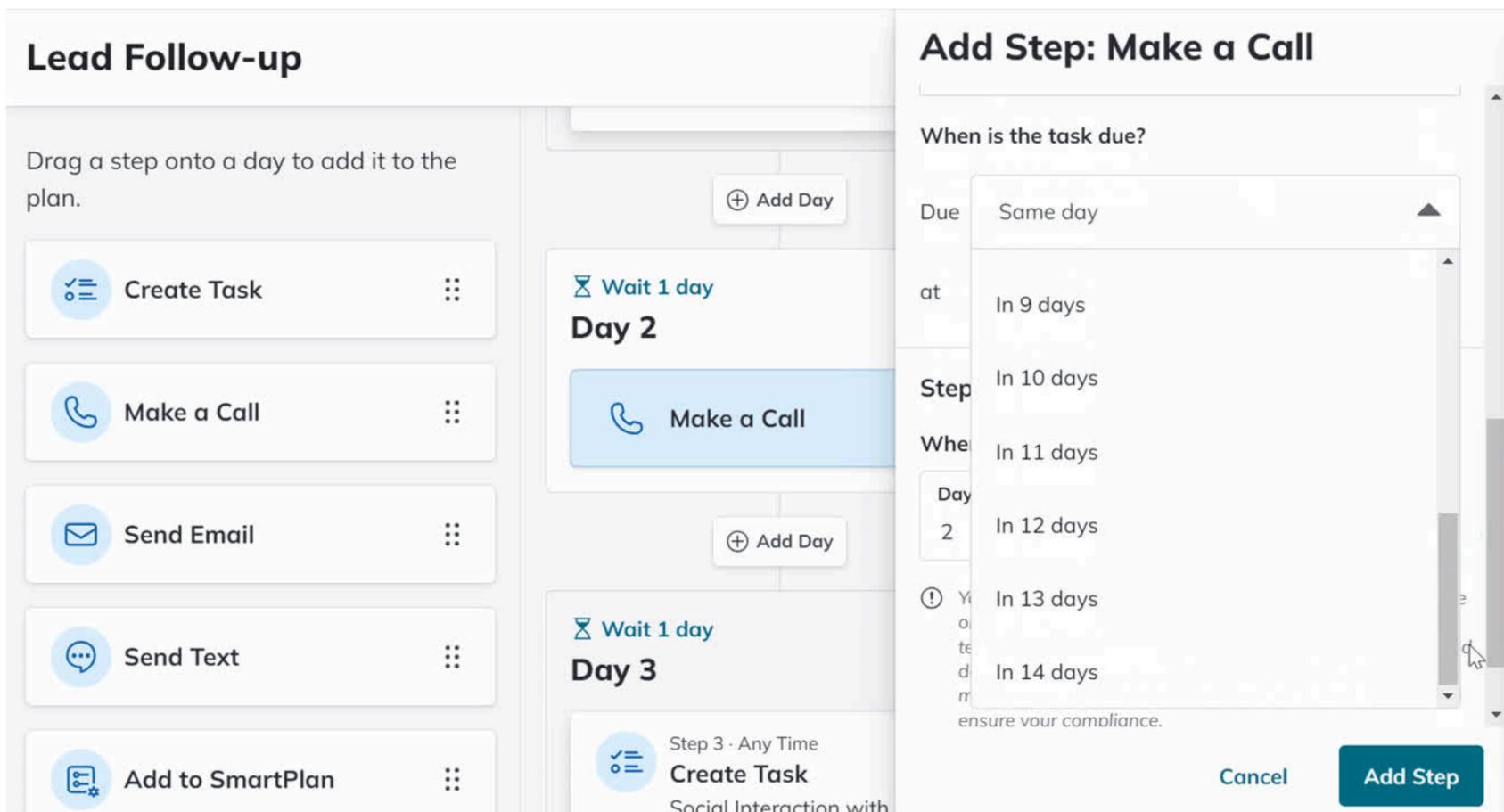
⊖ High

⊖ Medium

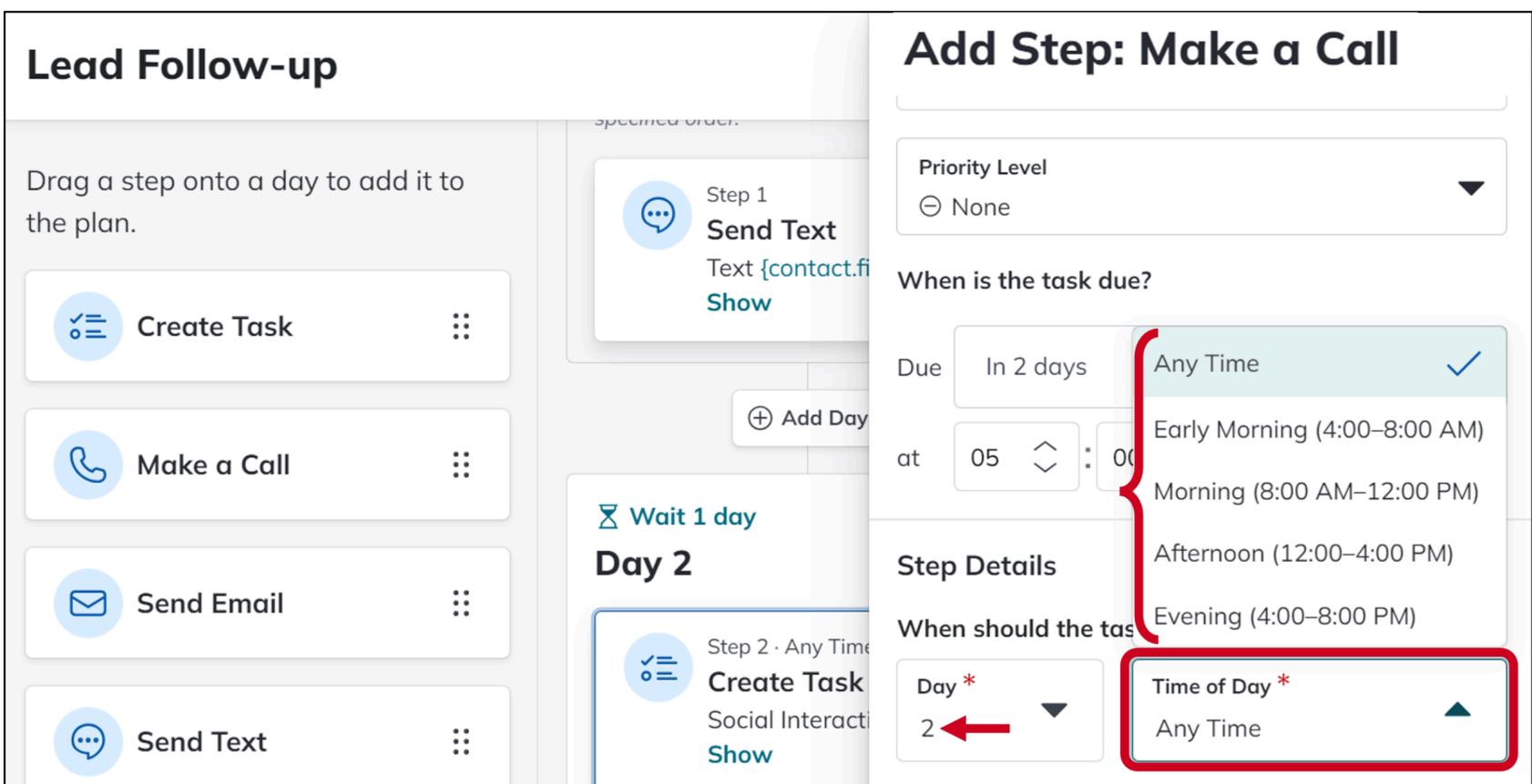
⊖ Low



4. In 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.

The screenshot shows a CRM interface. On the left, a 'Lead Follow-up' plan is visible with a 'Day 2' section containing a 'Make a Call' step. A modal dialog titled 'Add Step: Make a Call' is open on the right. It contains a light blue header with a checkmark icon and the text 'A new Call-type task will be created during this step.' Below this is a 'Task Details' section with a 'Task Name' field containing 'Call {contact.first.name} {contact.last.name}' and a 'Description' field containing 'Hey {contact.first.name},'. At the bottom right of the dialog, there are 'Cancel' and 'Add Step' buttons. The 'Add Step' button is highlighted with a red rectangular border.

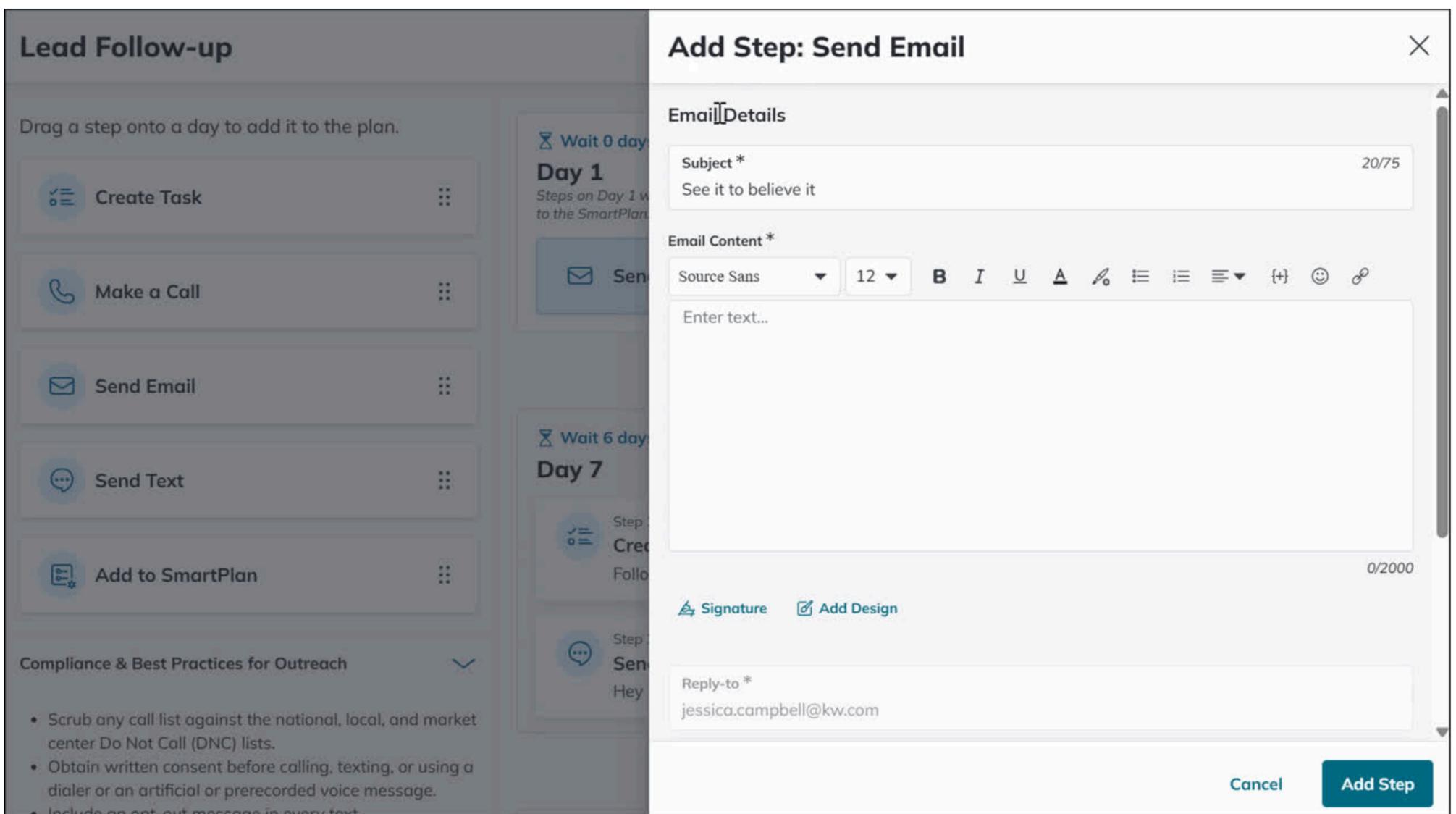
Send Email

1. Enter an **Email Subject**.

The screenshot shows a CRM interface. On the left, a 'Lead Follow-up' plan is visible with a 'Day 1' section containing a 'Send Email' step. A modal dialog titled 'Add Step: Send Email' is open on the right. It contains an 'Email Details' section with a 'Subject' field containing 'See it to believe it'. A red arrow points to the end of the subject text. Below this is an 'Email Content' section with a rich text editor toolbar and a text area containing 'Enter text...'. The dialog has a close button (X) in the top right corner.



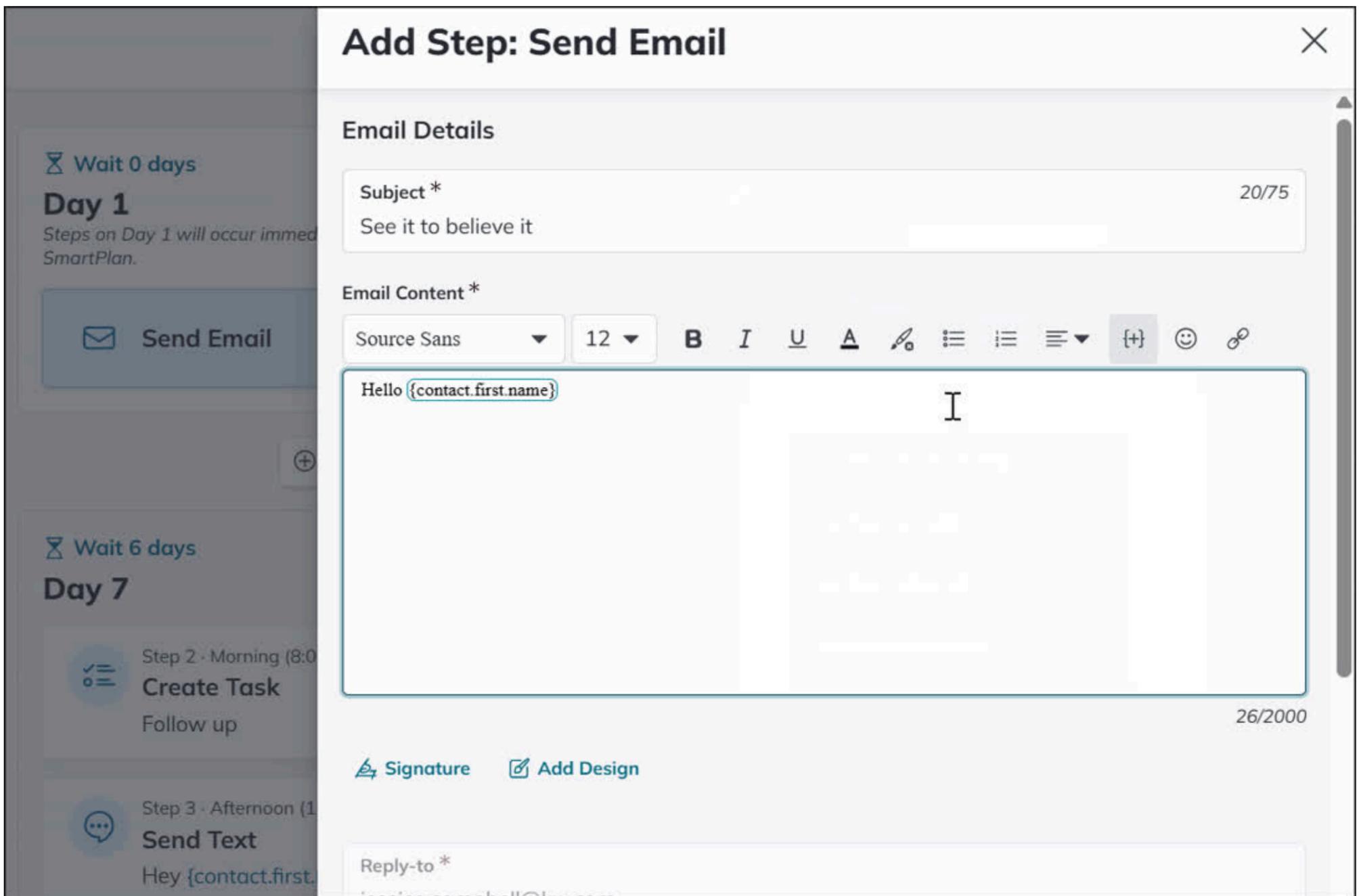
2. If you want to send an Email Design, instead of a simple email, click the **Add Design** button, at the bottom right of the modal. This will allow you to select an existing Email Design, with the opportunity to make last minute edits (**Edit Design** > [edit the Design](#) > **Save & Close**), and/or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



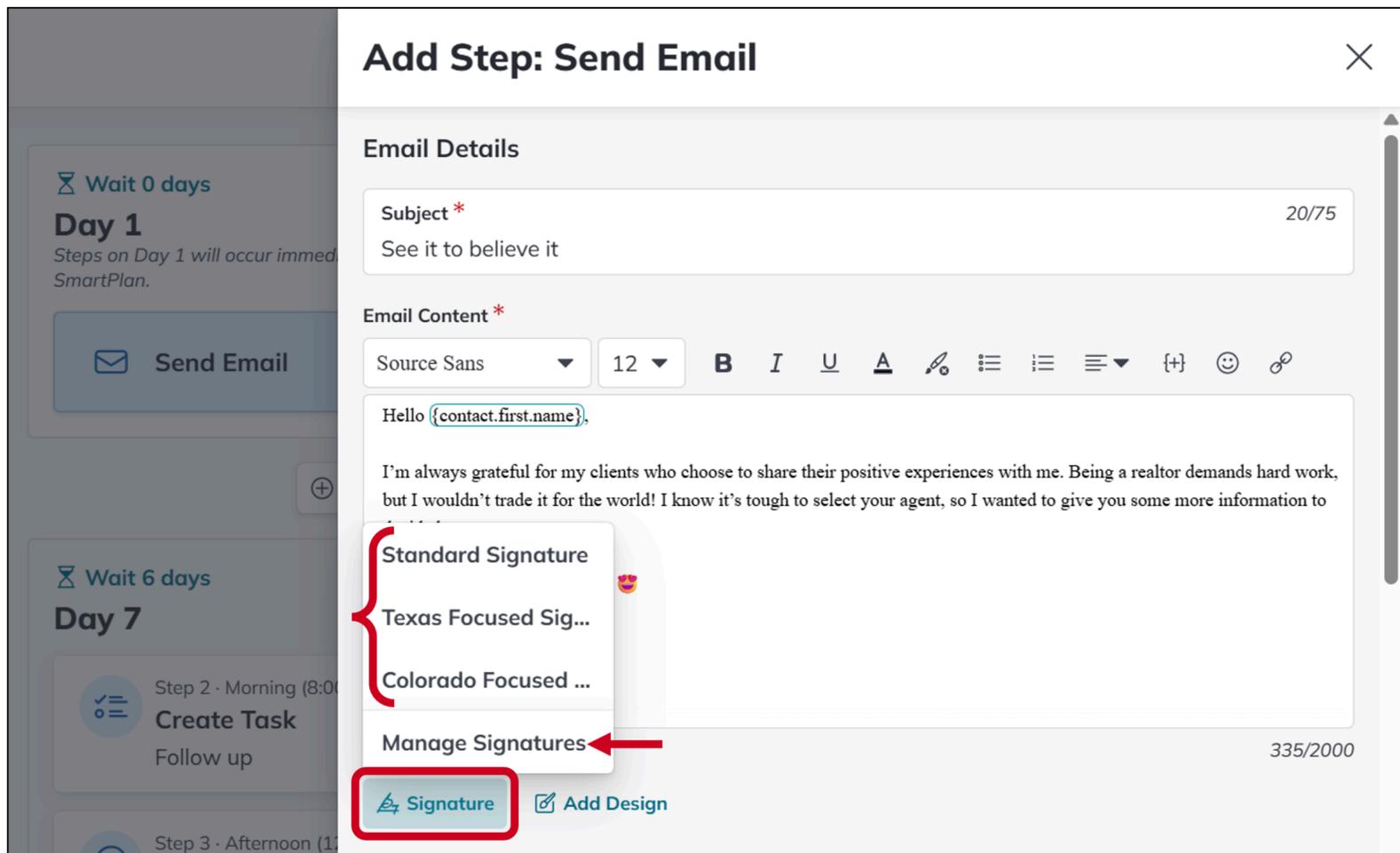
3. If you didn't select a design, enter the Body of the email. There are a few formatting options you have here:



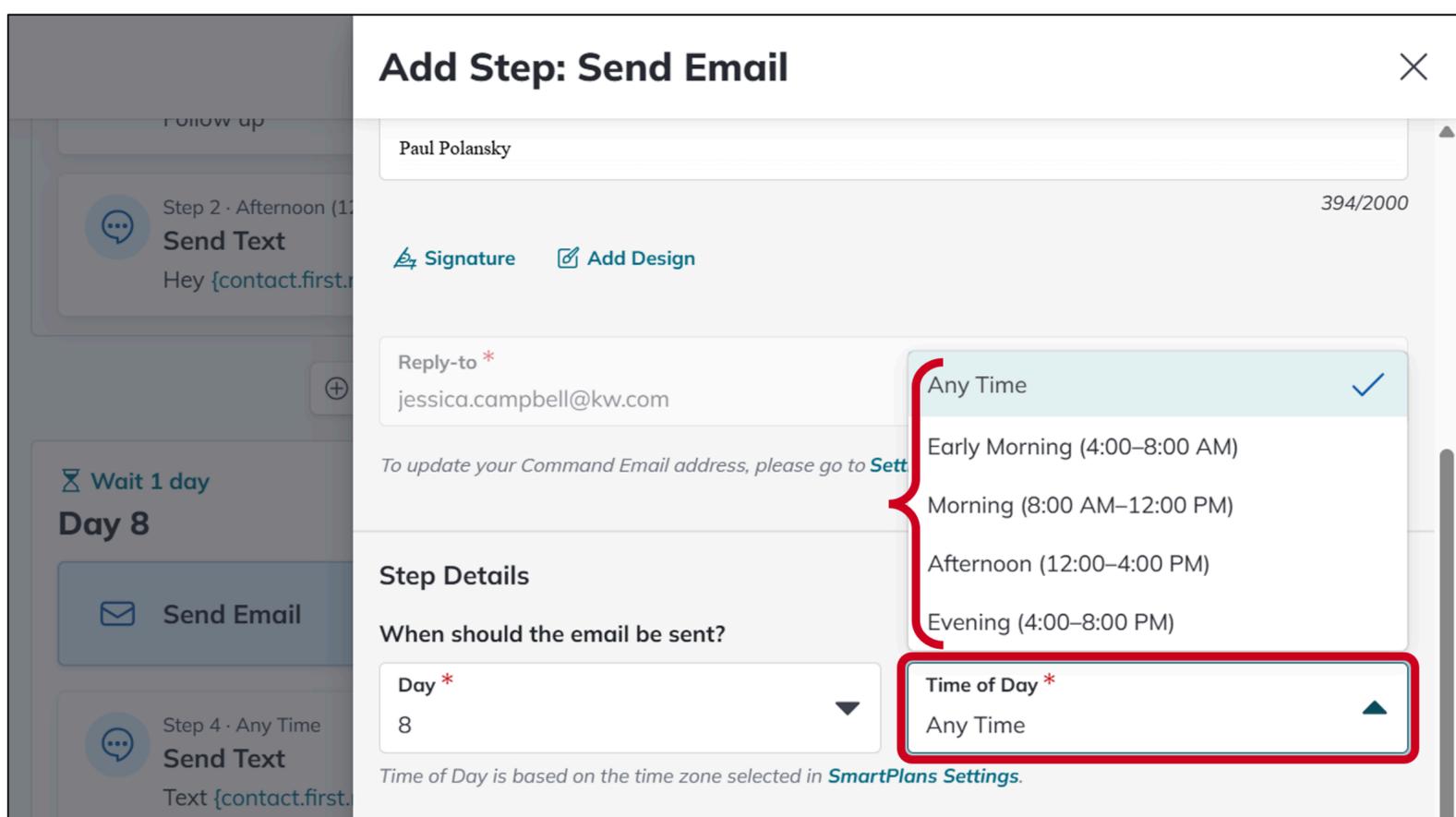
4. If you want to add a signature, click **Signature**, at the bottom of the modal, and select the signature you want to add to the email.



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.

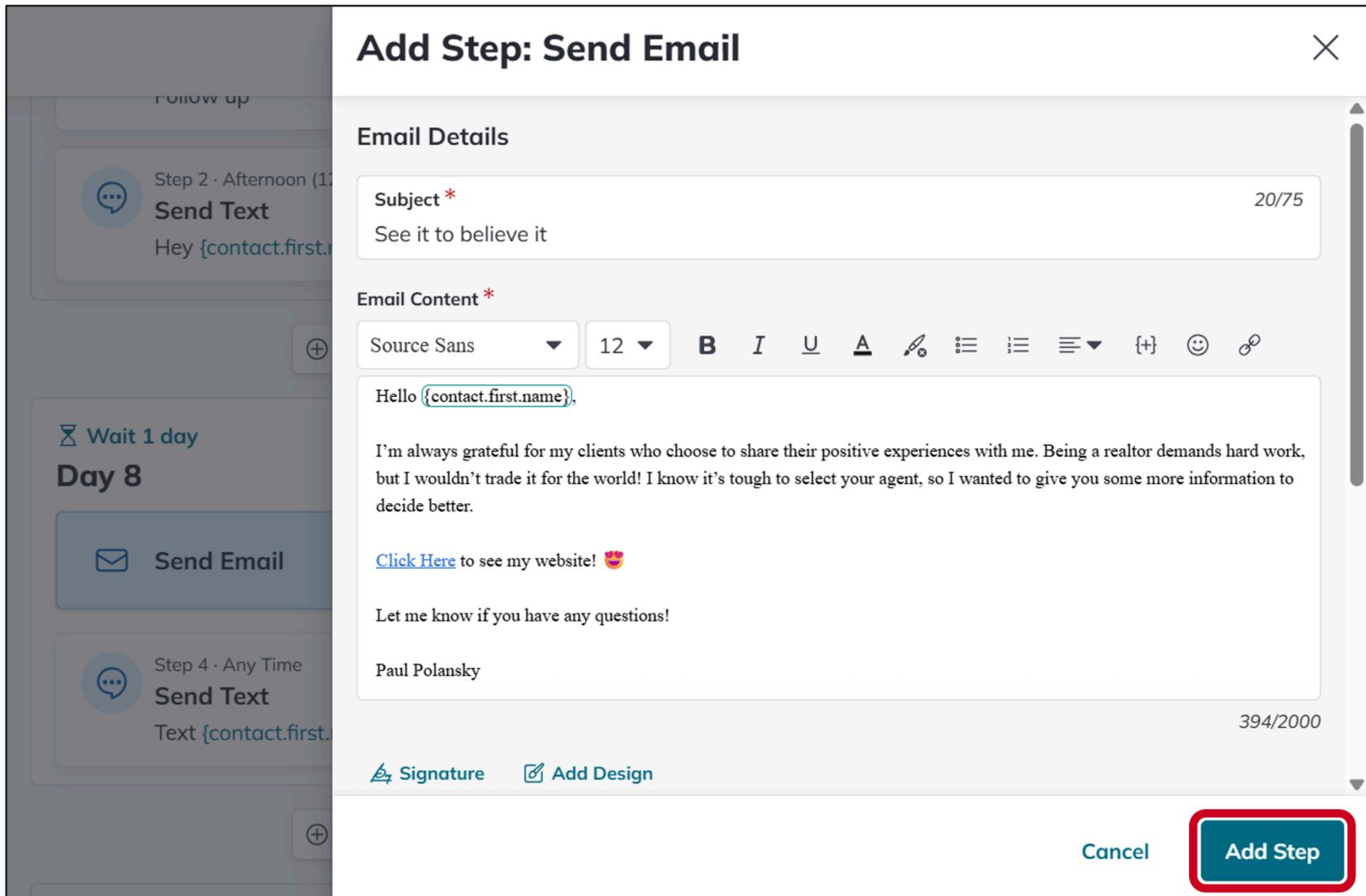


5. In the "When should the email be sent?" field, select the **Time of Day** you want the email to be sent (Any Time, Early Morning, Morning, Afternoon, Evening).





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

Lead Follow-up

Drag a step onto a day to add it to the plan.

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

contact is added to the SmartPlan.

Step 1
Send Text
Text {contact.first.name} Show

+ Add Day

⌚ Wait 1 day

Day 2

Send Text

+ Add Day

⌚ Wait 1 day

Add Step: Send Text

☑️ A new Text-type task will be created during this step.

Send an automated text
 Create a text task

Task Details

Task Name * 0/150
Enter task name...

Add Merge Tag ▾

Description 0/3000
Enter task description...

Cancel Add Step



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).

The screenshot shows the 'Add Step: Send Text' configuration panel. The main text area contains 'How's it going? 😊' and a smiley face icon. Below this is a 'Send From' dropdown set to 'Your Twilio account'. The 'Step Details' section includes a 'When should the text be sent?' dropdown set to 'Day 2' (indicated by a red arrow) and a 'Time of Day' dropdown set to 'Any Time' (highlighted with a red box). A red bracket groups the 'Time of Day' options: 'Any Time' (checked), 'Morning (8:00 AM-12:00 PM)', 'Afternoon (12:00-4:00 PM)', and 'Evening (4:00-8:00 PM)'. A note at the bottom states: 'Time of Day is based on the time zone selected in [SmartPlans Settings](#).'

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

This screenshot shows the 'Add Step: Send Text' configuration panel with different options selected. The 'Send an automated text' radio button is selected. Under 'Text Details', 'Text Type' is set to 'Static'. The 'Text' field contains 'Hey {contact.first.name},'. At the bottom right, the 'Add Step' button is highlighted with a red box, and the 'Cancel' button is also visible.



Add to SmartPlan

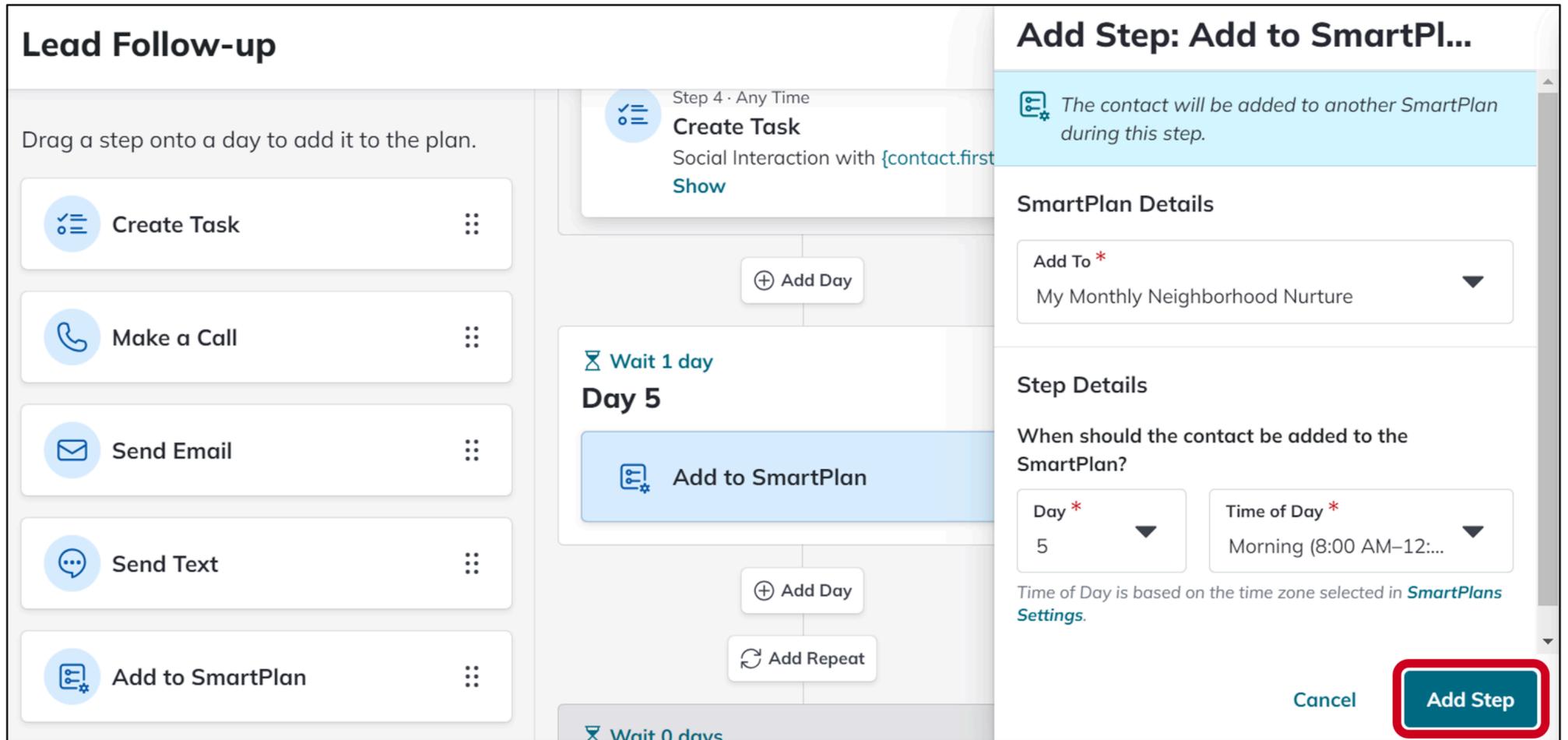
1. Use the "Add To" drop-down to **select the existing SmartPlan** you want to add the contact to, in this step.

This screenshot shows the 'Add Step: Add to SmartPlan...' configuration window. On the left, a 'Lead Follow-up' sidebar contains a list of actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. The main workspace shows a sequence of steps: 'Day 4' with a 'Create Task' step, followed by 'Day 5' with an 'Add to SmartPlan' step. The 'Add to SmartPlan' step is highlighted, and its configuration panel is open on the right. In this panel, the 'Add To' dropdown menu is expanded, showing a list of existing SmartPlans such as 'Financial Health Follow Up', 'Follow-Up', 'Single Email Follow-up', 'My Open House Followup', 'My Facebook Lead follow-up', 'R2 Appointment Follow-Up Plan', 'My Post closing follow up plan', and 'Follow Up Smart Plan'. A red box highlights the 'Add To' dropdown, and a red bracket groups the list of SmartPlans.

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).

This screenshot shows the same 'Add to SmartPlan' configuration window as above, but with the 'Step Details' section expanded. The 'When should the contact be added to the SmartPlan?' field is visible, showing a 'Day' dropdown set to '5' and a 'Time of Day' dropdown set to 'Any Time'. A red box highlights the 'Time of Day' dropdown, and a red bracket groups the list of time options: 'Any Time', 'Early Morning (4:00-8:00 AM)', 'Morning (8:00 AM-12:00 PM)', 'Afternoon (12:00-4:00 PM)', and 'Evening (4:00-8:00 PM)'. The 'Any Time' option is selected, indicated by a blue checkmark.

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



Lead Follow-up

Drag a step onto a day to add it to the plan.

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

Step 4 · Any Time
Create Task
Social Interaction with {contact.first
[Show](#)

+ Add Day

⌚ Wait 1 day
Day 5

Add to SmartPlan

+ Add Day

↻ Add Repeat

⌚ Wait 0 days

Add Step: Add to SmartPl...

 The contact will be added to another SmartPlan during this step.

SmartPlan Details

Add To *
My Monthly Neighborhood Nurture

Step Details

When should the contact be added to the SmartPlan?

Day *
5

Time of Day *
Morning (8:00 AM–12:...

Time of Day is based on the time zone selected in [SmartPlans Settings](#).

Cancel **Add Step**



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.

Lead Follow-up Save Plan ✕

Drag a step onto a day to add it to the plan.

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

Compliance & Best Practices for Outreach

Day 2 🗑️

Day Details

- Delay: Wait 1 day Edit
- Position: 2 Edit

Steps (1)

- Step 2 - Afternoon (12:00-4:00 PM) Send Text View Details

Day 3

Step 3 - Any Time



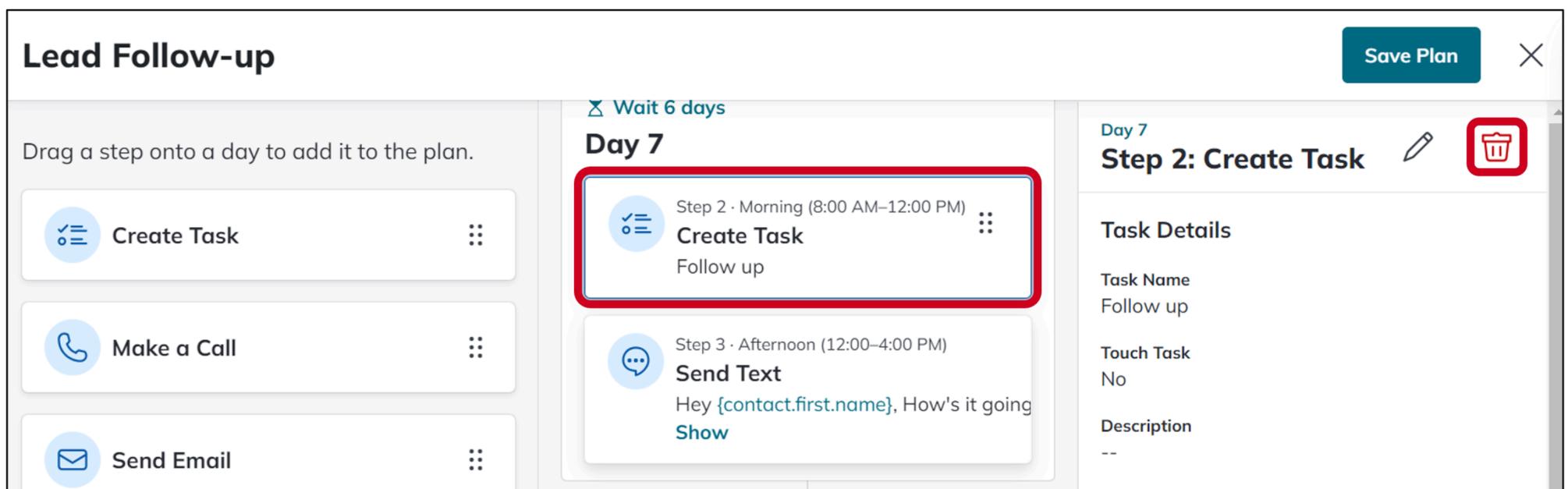
Edit a Step

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.

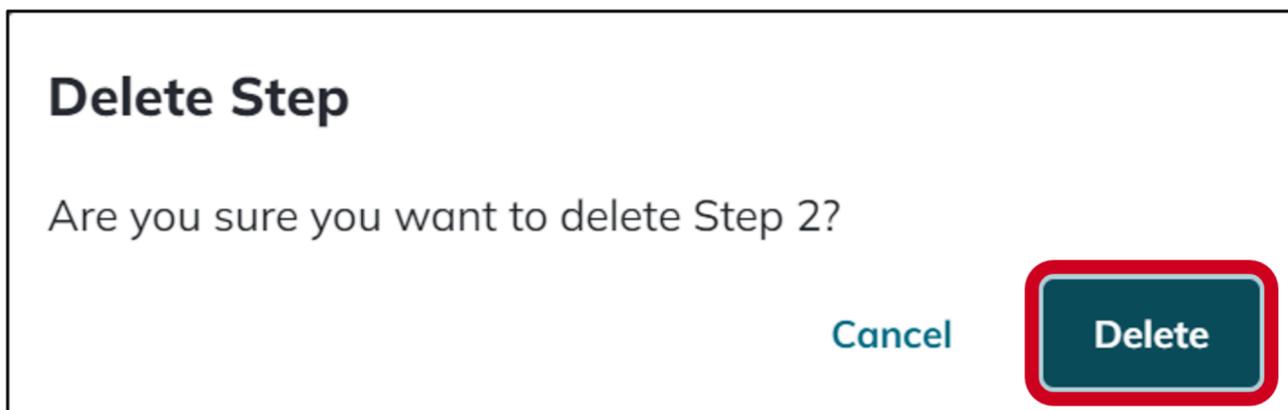
The screenshot displays the 'Lead Follow-up' interface. On the left, a sidebar lists actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. The main area shows a task plan for 'Day 7' with a 'Wait 6 days' delay. The selected step is 'Create Task' with the text 'Follow up'. A modal window titled 'Edit Step: Create Task' is open on the right, showing fields for 'Hyperlink', 'Priority Level' (set to 'None'), 'When is the task due?' (set to 'Same day' at '11:59 AM', with 'All Day' checked), and 'Step Details' (set to 'Day 7' and 'Morning (8:00 AM-12:00 PM)'). The modal includes 'Cancel' and 'Save Changes' buttons.

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.

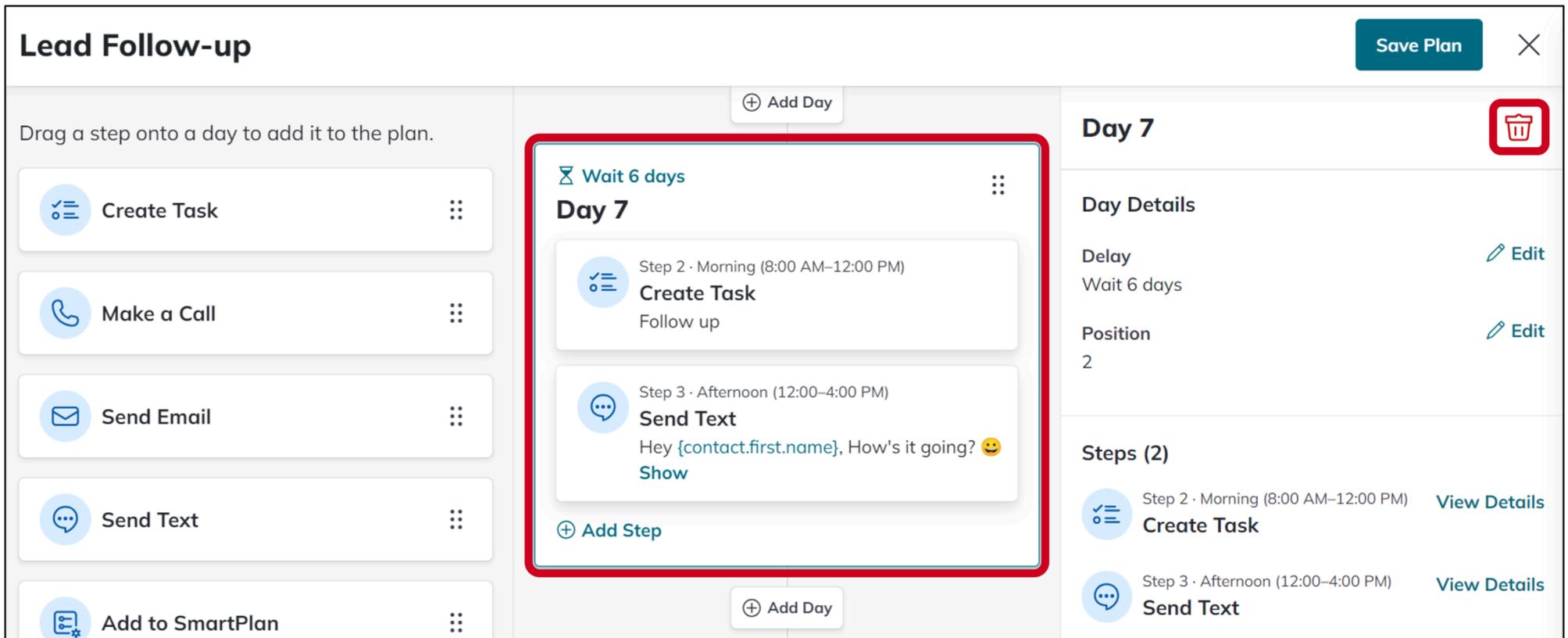
A screenshot of a 'Lead Follow-up' interface. On the left, there's a list of actions: 'Create Task', 'Make a Call', and 'Send Email'. In the center, a 'Day 7' section shows two steps: 'Step 2 - Morning (8:00 AM-12:00 PM) Create Task Follow up' and 'Step 3 - Afternoon (12:00-4:00 PM) Send Text Hey {contact.first.name}, How's it going Show'. The 'Step 2' card is highlighted with a red border. On the right, a 'Task Details' panel for 'Step 2: Create Task' is visible, with a red trash icon in the top right corner. A 'Save Plan' button is in the top right of the main interface.

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

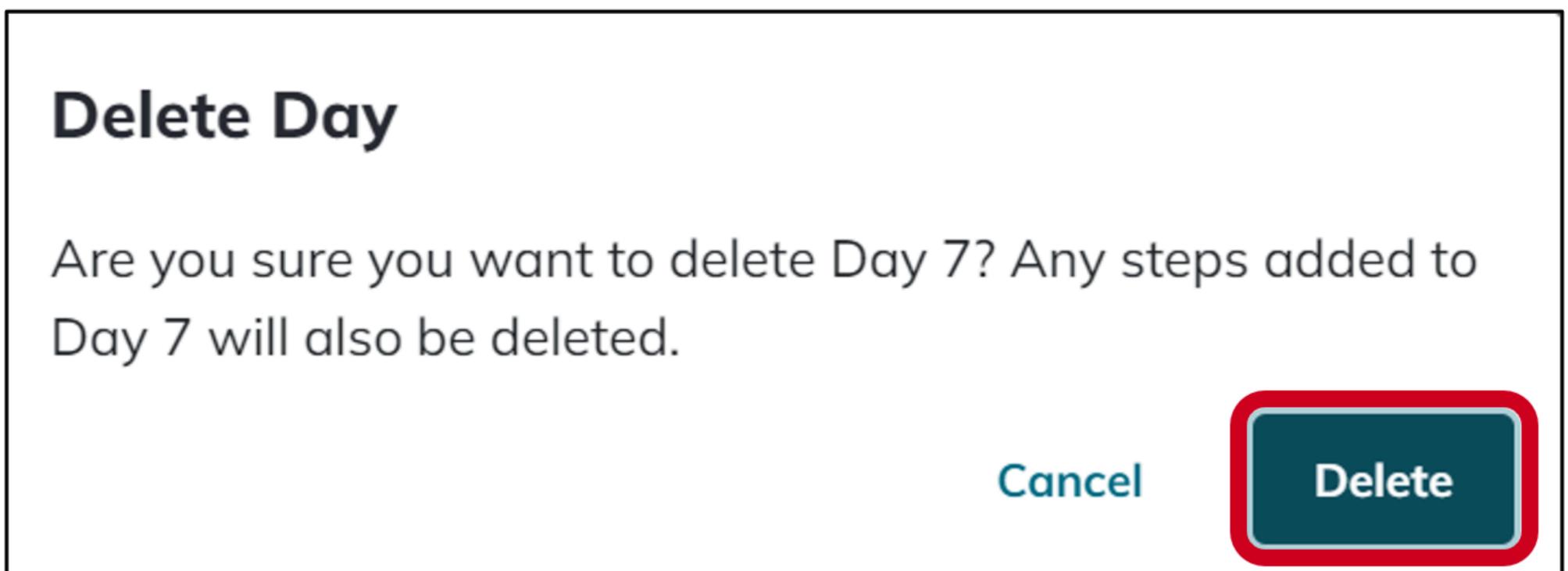
A confirmation dialog box titled 'Delete Step'. The text inside asks, 'Are you sure you want to delete Step 2?'. At the bottom right, there are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is highlighted with a red border.



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.

A screenshot of the 'Lead Follow-up' interface. The title 'Lead Follow-up' is at the top left. A 'Save Plan' button is at the top right. The main area is divided into three sections. On the left, a list of actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. In the center, a 'Day 7' card is highlighted with a red border. It shows a 'Wait 6 days' duration and two steps: 'Create Task' (Follow up) and 'Send Text' (Hey {contact.first.name}, How's it going? 😊). On the right, a 'Day 7' details panel is visible, showing 'Day Details' (Delay: Wait 6 days, Position: 2) and 'Steps (2)' (Step 2: Create Task, Step 3: Send Text). A red trash icon is located at the top right of the 'Day 7' card.

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

A confirmation dialog box titled 'Delete Day'. The text inside asks: 'Are you sure you want to delete Day 7? Any steps added to Day 7 will also be deleted.' At the bottom right, there are two buttons: 'Cancel' and 'Delete'. The 'Delete' button is highlighted with a red border.



Add a Repeat (end of the SmartPlan)

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

This screenshot shows the 'Lead Follow-up' SmartPlan editor. On the left is a sidebar with step options: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. The main workspace shows a workflow starting with 'Create Task' (Social Interaction with {contact.first.name} {cont...}), followed by 'Add Day', 'Wait 1 day Day 10', and 'Add to SmartPlan' (My Monthly Neighborhood Nurture). Below this is another 'Add Day' button, and then the 'Add Repeat' button, which is highlighted with a red rectangle. At the bottom of the workflow is 'Wait 0 days End of SmartPlan' (Remove contact from the plan on Day 10). On the right, the 'SmartPlan Details' panel shows 'Plan Details' (Name: Lead Follow-up, Duration: 10 days, Steps: 6, Touches: 4) and 'Auto Add/Remove Rules' (Add contact when tagged: Facebook Lead). A 'Save Plan' button is in the top right corner.

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.

This screenshot shows the 'Add Repeat' panel overlaid on the SmartPlan editor. The 'Delay (Days)' field is highlighted with a yellow box and contains the number '0'. Below it is the text 'Set the number of days to wait before the plan starts repeating.' The 'Number of Repeats' field contains the number '1'. At the bottom right of the panel are 'Cancel' and 'Add Repeat' buttons. The background shows the 'Lead Follow-up' editor with the 'Add Repeat' button highlighted in red.



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

This screenshot shows the 'Add Repeat' dialog box overlaid on a 'Lead Follow-up' plan. The dialog has two main sections: 'Delay (Days)' and 'Number of Repeats'. The 'Delay (Days)' section has a text input field containing '30' and a dropdown arrow. Below it is the text 'Set the number of days to wait before the plan starts repeating.' The 'Number of Repeats' section has a dropdown menu with '1' selected. A red box highlights the '1' in the dropdown. Below the dropdown is a list of options: '2', '3', '4', '5', '6', and 'Unlimited'. A red bracket groups the options from '2' to '6'. At the bottom right of the dialog, there are 'Cancel' and 'Add Repeat' buttons.

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

This screenshot shows the 'Add Repeat' dialog box with the 'Add Repeat' button highlighted. The 'Delay (Days)' section now has a text input field containing '0'. Below it is the text 'Set the number of days to wait before the plan starts repeating.' The 'Number of Repeats' section has a dropdown menu with '1' selected. Below the dropdown is the text 'Repeat the plan 1-6 times or select Unlimited to repeat the plan indefinitely.' At the bottom right of the dialog, there are 'Cancel' and 'Add Repeat' buttons. The 'Add Repeat' button is highlighted with a yellow box.



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

The screenshot displays the 'Lead Follow-up' SmartPlan interface. On the left, a sidebar lists actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. The main workspace shows a sequence of steps: 'Create Task' (Social Interaction with {contact.first.name}), a 'Wait 1 day' interval, 'Day 10', 'Add to SmartPlan' (My Monthly Neighborhood Nurture), another 'Wait 1 day' interval, and finally a 'Repeat Plan' step (Repeat Unlimited times, starting on Day 4). The 'Repeat Plan' step is highlighted in light blue and has a trash icon next to it. On the right, the 'SmartPlan Details' panel shows: Plan Name 'Lead Follow-up', Duration '40 days', Steps '6 steps', Touches '4 touches', and Repeat settings 'Repeat Unlimited times'. A 'Save Plan' button is in the top right corner.



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.

A screenshot of a software interface for configuring a 'Lead Follow-up' SmartPlan. The interface is divided into three main sections. On the left, there is a list of actions to be added to the plan: 'Create Task', 'Make a Call', and 'Send Email', each with a corresponding icon and a three-dot menu. The middle section shows the plan's configuration, including a trigger 'Add Trigger Tags', a wait time of '0 days', and a 'Day 1' step titled 'Send Text' with a text message template. On the right, the 'SmartPlan Details' panel shows the current 'SmartPlan Name' as 'Lead Follow-up' and includes an 'Edit' button next to it. A red box highlights the 'Save Plan' button in the top right corner and the 'Edit' button in the details panel. Another red box highlights the 'SmartPlan Name' field and its 'Edit' button.



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**.

The screenshot shows two side-by-side panels from a software interface. The left panel, titled 'Lead Follow-up', contains a list of actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. Below this list is a section for 'Compliance & Best Practices for Outreach'. The right panel, titled 'Add Trigger Tags', features a blue information box stating 'Trigger tags are not retroactive.' Below this, it explains that trigger tags activate immediately and only add contacts once. A search bar with the text 'lead' is present, and a list of tags is shown: 'ELP Lead', 'Facebook Lead', and 'FB Lead'. At the bottom right of this panel are 'Cancel' and 'Add Triggers' buttons.

3. Ensure you **save the plan**, 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:

This screenshot shows two panels from a CRM interface. The left panel, titled 'Lead Follow-up', contains a list of actions: 'Create Task', 'Make a Call', 'Send Email', 'Send Text', and 'Add to SmartPlan'. The right panel, titled 'Add Repeat', has a 'Delay (Days)' dropdown set to 30 and a 'Number of Repeats' dropdown set to 1. A red box highlights the 'Number of Repeats' dropdown, and a red bracket groups the options 2 through 6.

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

This screenshot shows the 'Lead Follow-up' section of the CRM interface. The 'Save Plan' button in the top right corner is highlighted with a red box. The main area shows a plan configuration for 'Day 1' with a 'Send Text' step. On the right side, the 'Auto Add/Remove Rules' section is visible, with two checkboxes under 'Remove contact when' checked: 'Contact replies to an email from this SmartPlan' and 'Contact replies to an automated text from this SmartPlan'.



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:

A screenshot of the Command Central user interface. The top navigation bar shows "command connect" and a notification bell icon with a red circle containing the number "20". A red box highlights this notification icon, with a red arrow pointing down to a "Notifications" modal window. The modal window has tabs for "Unread" and "Read", with "Unread" selected. It shows "20 Unread" notifications. A notification for "Command Email Reply from Jessica Campbell" is highlighted with a red box. The notification text reads: "Email from jessica.campbell234456@gmail.com was forwarded to you at paul.polansky12@gmail.com". A red box highlights the "View Details" link at the bottom right of the notification. The background shows a dashboard with "Welcome Home, Jessica" and various metrics like "Leads Never Contacted" (11) and "Recently Active" (0).

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.

A screenshot of the contact timeline for Paul Polansky. The contact's name "Paul Polansky" is at the top, with a "Health Score" of 68%. The timeline shows three items: "SMARTPLAN | REMOVED" (highlighted with a red box), "EMAIL RECEIVED | 9:31 AM FORWARDED TO REPLY-TO EMAIL" (highlighted with a red box), and "COMMAND EMAIL SENT | 9:28 AM SENT FROM SMARTPLANS". The "SMARTPLAN | REMOVED" item includes the text: "Automatically removed from Lead Follow-up SmartPlan because the contact responded to an email from the plan." The "EMAIL RECEIVED" item includes the email details: "From: Jessica Campbell (jessica.campbell234456@gmail.com)", "To: Paul Polansky (paul.polansky12@gmail.com)", and "Subject: Re: See it to believe it". The "COMMAND EMAIL SENT" item is partially visible at the bottom.