# How do I...

#### From the Home Screen:



Select the Contacts tab. Select a checkbox to choose a contact.



Select **Assign Plan.** Choose a plan from the dropdown menu. Select a start date. Select **Assign Plan to Contacts.** 

**Note:** Some plans require additional information such as a MLS number for the Listing Activity Report plan. If the plan does require more information the Assign Plan button will be muted in color until the information is added.

### From the Contacts Screen:



Contacts on the home screen have been updated in the last three months. To access older contacts, select **Contacts** in the global menu on the home screen.



From either your dashboard or My Contacts page, select the name of the contact.

## step 3

Scroll down to the Manage Plans section. Select the plus icon to open. Select **Assign New Plan**.



Choose a plan from the dropdown menu. Select a start date. Select **Assign Plan.** On the contact details screen, select **Update Contact.** 

## Assign a Plan to my Contact

Send Email		Assign Plan	Add Conta		Save Search	Create Mailers
Select All	Name		17	Phone	Email	
Test Sorin		Mobile:608-695- 5416		-695- lena@	lena@virtualproperties.con	

Plan	Automatic Weekly Lis	ting Activity Report Email	•
Start Date 01/30/2018			<b></b>
MLS Number	MLS# 217091978 Selec	ted	
Select All	Name	Email	

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[ - ] Groups									
2 45th	(0)	Family and Friends	(1)	Past Customers					
No Contacts		Testing Test		No Contacts					
Add Contacts		Add Contacts V	iew All	Add Contacts					
[-] Manage Plans Assign New Plan 3									
Start Date MLS Number	01/30/2016								
		4							
	+ Assign Plan to 1 Contacts								