

From the Home Screen:

step 1

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

step 2

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:

step 1

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.

step 2

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**.

step 4

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

