

Command Lab Activity Checklist

Make Command stronger by completing the following activities.

Set Up Your Database

- Import your contacts from your current CRM or spreadsheet into Command.
- Add a contact to Command through Kelle.
- Add a new contact through Command.
- Edit a contact and add a custom field.
- Group your contacts by adding tags.
- Create a filter for your contacts in Command.
- Group filters into a SmartView.
- Make a call to a contact through Kelle. When prompted, add a note about your discussion.
- Find the note in Command.

Lead Accelerator

- View the Payment Profile page.
- Add a payment method (optional).
- Create a draft of a Facebook ad.
- Create a draft of an ad that is used across multiple social media networks.
- Create a draft of a postcard.

Designs by SketchHouse

- Edit a template in Designs.
- Create a template in Designs using content blocks, widgets, and/or merge tags.

Opportunities

- Create stages in a phase of your pipeline.
- Create an opportunity and name it "Test."
- Drag the Test opportunity through the stages of a phase in your pipeline.

- Create two offers and name them "Test1" and "Test2."
- Compare these test offers.

Command Chat

- Start a chat with someone on your team or in the market center.
- Start a chat with someone in your Referrals network.
- Start a group chat.

Communities with Kelle Engagement

- Post an introduction in the Command Labs group.
- Add a post and attract a colleague's attention by typing an @ and then begin typing their name (for example @John Smith). Ask them to respond to you.
- Watch for post notifications in Kelle.
- Reply to a post you receive in Kelle.
- Reply to a post you receive in Command.
- Create and post a poll to the Command Labs group.
- Vote on a poll.
- Like a post or a comment.

Local Insights

- Pick a neighborhood and find a Local Insight on Kelle.
- Add a Local Insight on Kelle.
- Upvote or downvote a Local Insight on Kelle.
- Find your Local Insights in Kelle and change the wording or add a new picture.