


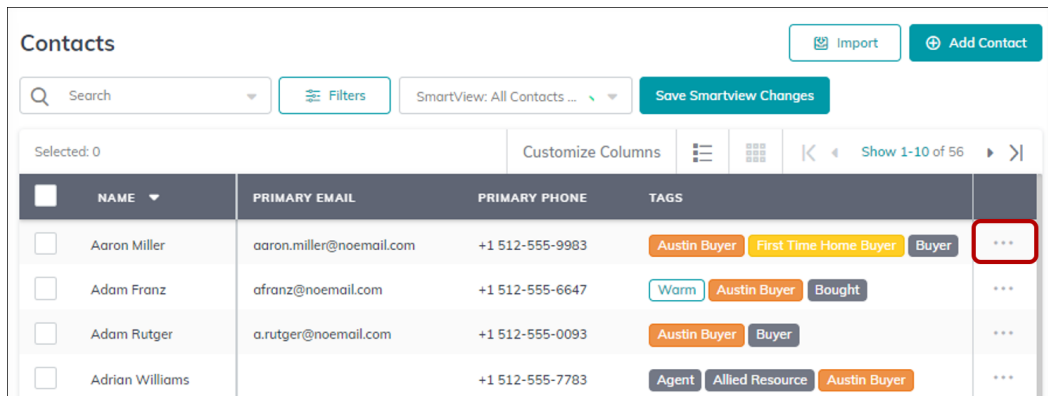
Add a Relationship to a Contact

Zack Mokry - 2021-07-02 - Contacts

If any of your contacts are associated with another contact, you are able to add the relationship.

To learn how to add a relationship to a contact, follow the steps below:

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.
2. Click the **Contacts icon**, , on the left sidebar
3. Locate the contact you want to add a relationship to and click the three dots.



<input type="checkbox"/>	NAME	PRIMARY EMAIL	PRIMARY PHONE	TAGS	
<input type="checkbox"/>	Aaron Miller	aaron.miller@noemail.com	+1 512-555-9983	Austin Buyer First Time Home Buyer Buyer	...
<input type="checkbox"/>	Adam Franz	afranz@noemail.com	+1 512-555-6647	Warm Austin Buyer Bought	...
<input type="checkbox"/>	Adam Rutger	a.rutger@noemail.com	+1 512-555-0093	Austin Buyer Buyer	...
<input type="checkbox"/>	Adrian Williams		+1 512-555-7783	Agent Allied Resource Austin Buyer	...

4. Click **Edit**.

Contacts Import Add Contact

Search Filters SmartView: All Contacts ... Save Smartview Changes

Selected: 0 Customize Columns Show 1-10 of 56


NAME	PRIMARY EMAIL	PRIMARY PHONE	TAGS
<input type="checkbox"/> Aaron Miller	aaron.miller@noemail.com	+1 512-555-9983	Austin Buyer First Time Home Buyer Buyer
<input type="checkbox"/> Adam Franz	afranz@noemail.com	+1 512-555-6647	Warm Austin Buyer Bought Edit
<input type="checkbox"/> Adam Rutger	a.rutger@noemail.com	+1 512-555-0093	Austin Buyer Buyer
<input type="checkbox"/> Adrian Williams		+1 512-555-7783	Agent Allied Resource Austin Buyer
<input type="checkbox"/> Alex Adams L	alex.adams@noemail.com		
<input type="checkbox"/> Amy Jones	ajones@noemail.com	+1 512-555-9981	Cold First Time Home Buyer Buyer
<input type="checkbox"/> Annie Agent	annie.agent@kw.com	+1 512-555-9904	Austin Buyer Buyer
<input type="checkbox"/> Avery Williams L	avery.williams@noemail.com		
<input type="checkbox"/> Ben Wright L	ben.wright1@myemail.com	+1 512-555-9998	Austin Buyer Buyer

- Add Activity
- Share Contact
- Add Note
- Archive
- View Smartplans
- Add to SmartPlan
- Unmark as Lead
- Assign To


5. Click **Add Relationship**.

Edit Contact ✕

Full Name*
Aaron Miller

+ Add Relationship 

Primary Email
Personal ▾ aaron.miller@noemail.com

Primary Phone
Mobile ▾  ▾ (512) 555-9983

Mark as Lead Add to Sales Pipeline


Tags
Austin Buyer ✕ First Time Home Buyer ✕ Buyer ✕ ✕ ▾

+ Add More Information

Cancel Save

6. Select the relationship from the drop-down.

Spouse ▲ Select or Create Contact ▾ Add

Spouse  onship

Father

Mother

Son aaron.miller@noemail.com

7. Search and select the **contact**. If the contact doesn't exist, you can create the contact by clicking **Add**. If the contact already exists you do not have to click Add.

Edit Contact ✕

Full Name*

 ✕ ▼ Add

no contact "Tanya Miller" selected, you can create one by clicking "Add" button

⊖ Remove Relationship

8. Click **Save** when finished.

Edit Contact ✕

Full Name*


Spouse ▼ Tanya Miller ✕ ▼ Add

⊖ Remove Relationship

Primary Email

Personal ▼ aaron.miller@noemail.com

Primary Phone

Mobile ▼  ▼ (512) 555-9983

Mark as Lead Add to Sales Pipeline

Tags

Austin Buyer ✕ First Time Home Buyer ✕ Buyer ✕ ✕ ▼

⊕ Add More Information

Cancel Save

The relationship will be displayed in the About section at the bottom of both contact records.

ABOUT

Description	--
Birthday	--
Home Anniversary	--
Relationships	Tanya Miller (Spouse)
Company	--
Title	--
Company Address	--

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