

Avoid Fines from Violating the Telephone Consumer Protection Act (TCPA)

Why the TCPA matters to you:



You will be **personally liable** for any violations of the TCPA.



Fines can be as much as **\$500 per call or text**, and add up quickly.

Before making your next call or text:



DO NOT use an **automated platform vendor** to call or text potential customers.
DO NOT leave pre-recorded messages.



Check phone numbers against Do Not Call Lists prior to making any calls or texting.



Get prior written consent before calling or texting a number on the **Do Not Call Lists**.

TCPA Myths Dispelled

Myth 1:

"The TCPA applies to calls, not texts."

NOT TRUE. *The TCPA covers both calls and texts.*

Myth 2:

"I checked the Do Not Call (DNC) Lists when I got the number; I'm covered."

NOT TRUE. *Numbers are added to the DNC Lists all the time. If you haven't recently checked the number against the DNC Lists, you must do so before calling or texting.*

Myth 3:

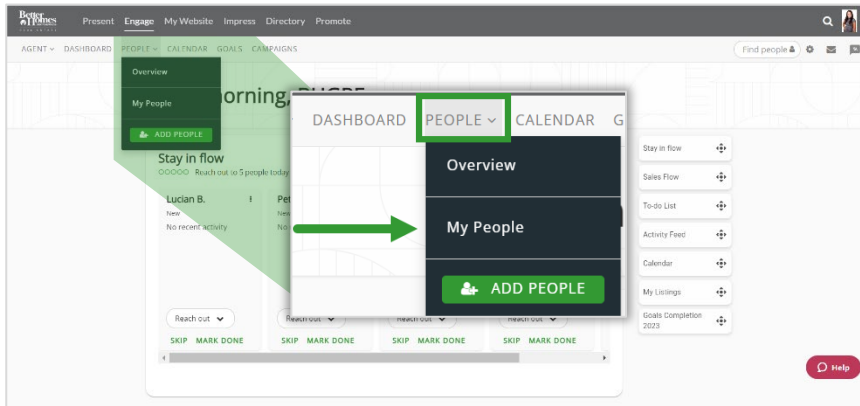
"A friend gave me this person's number, so I don't need to check the DNC Lists."

NOT TRUE. *If the person you are going to call or text did not give you the number, you must check the DNC Lists.*



Organizing your Contacts with Groups

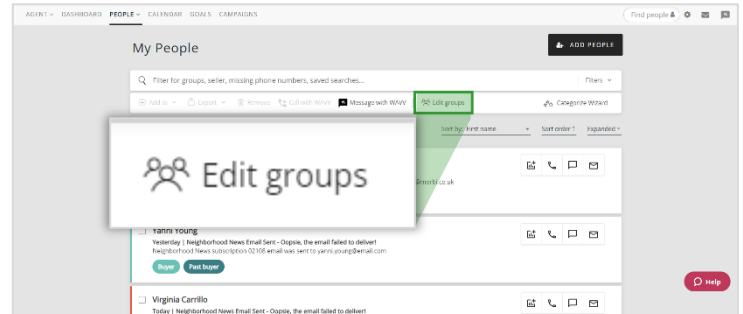
Do you have baseball fans that you would like to send a special note to on Opening Day? Or a selection of people you may want to send a postcard of your Just Listed or Just Sold properties? You can use groups to sort the People in your contact database to make it easier to share relevant and timely communications.



Starting from your MoxiEngage® dashboard, from the **People** menu, select **My People**.

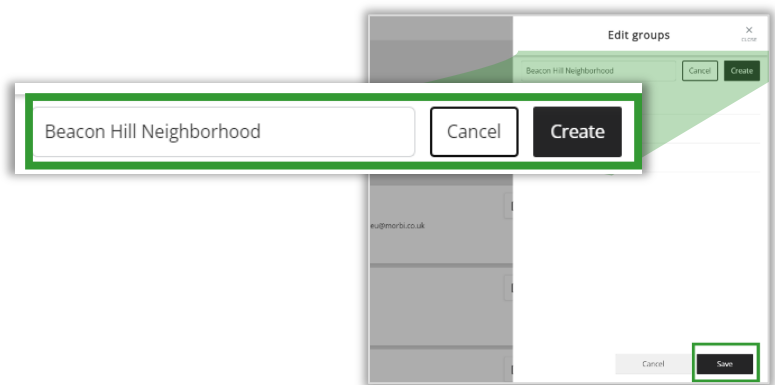
Create the Group

From the My People screen, click **Edit Groups**.



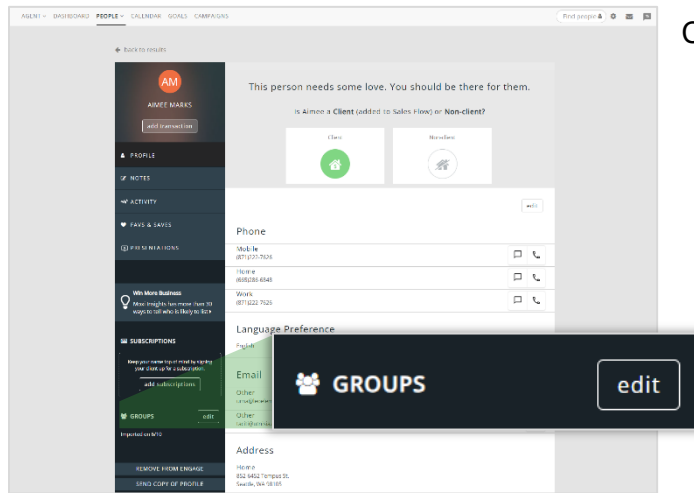
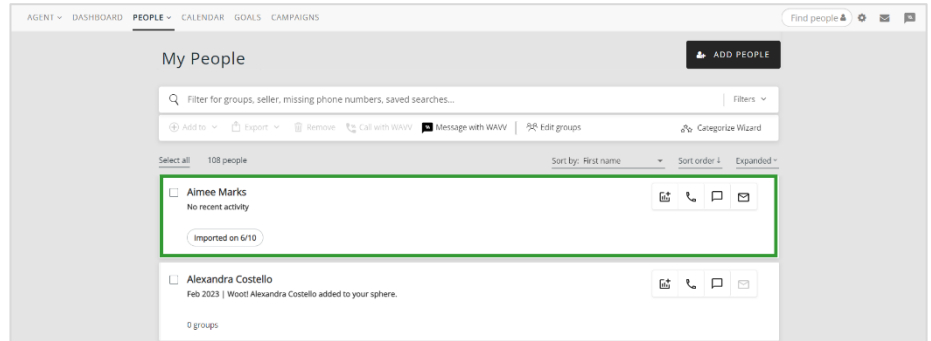
Give the group a name that identifies who they are and click **Create**. For example, a neighborhood, sports fans, etc.

Then click **Save** in the bottom right.



Add a Contact to the Group

Next, select the **contact's** name to open the contact details.



Click **edit** next to Groups from the left side menu.

From the list of groups, click the **plus sign** to add the contact to the group.

Contacts can be added to as many groups as you choose, so select all groups that apply.

Click **Done** to save your selections.



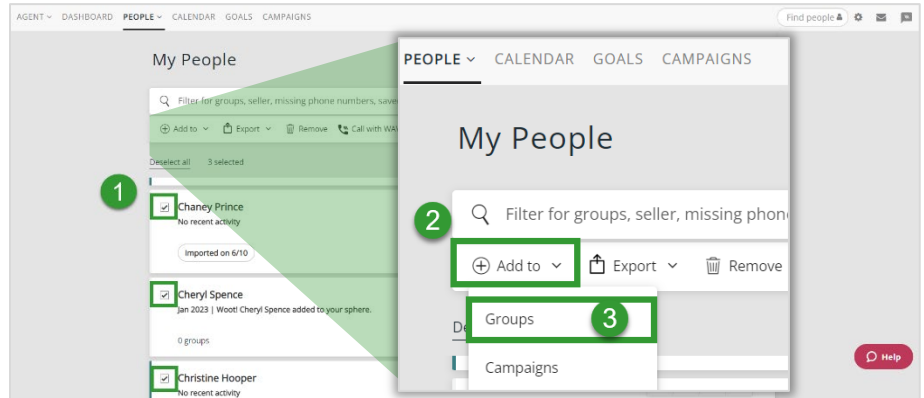
***If you choose to make contact by phone or text (i) check phone numbers against the federal DNC registry, any state DNC list and your company DNC list (ii) do NOT use autodialers and (iii) do NOT use artificial voice or pre-recorded messages.**

****Emails must follow CAN-SPAM rules. You should also check to make sure you follow the Do Not Email/Unsubscribe Requests.**

Add Multiple Contacts to the Group

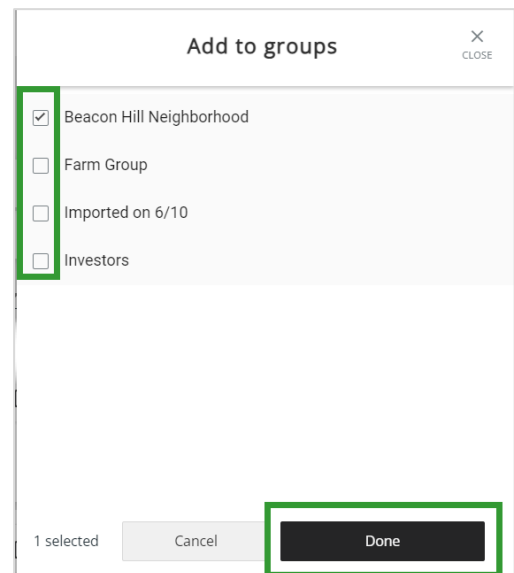
You can also add multiple contacts to a group from the My People screen.

1. Select the **checkbox** next to each **contact** that you would like to add to the group.
2. Then select **Add to**.
3. And then select **Groups** from the drop-down menu.



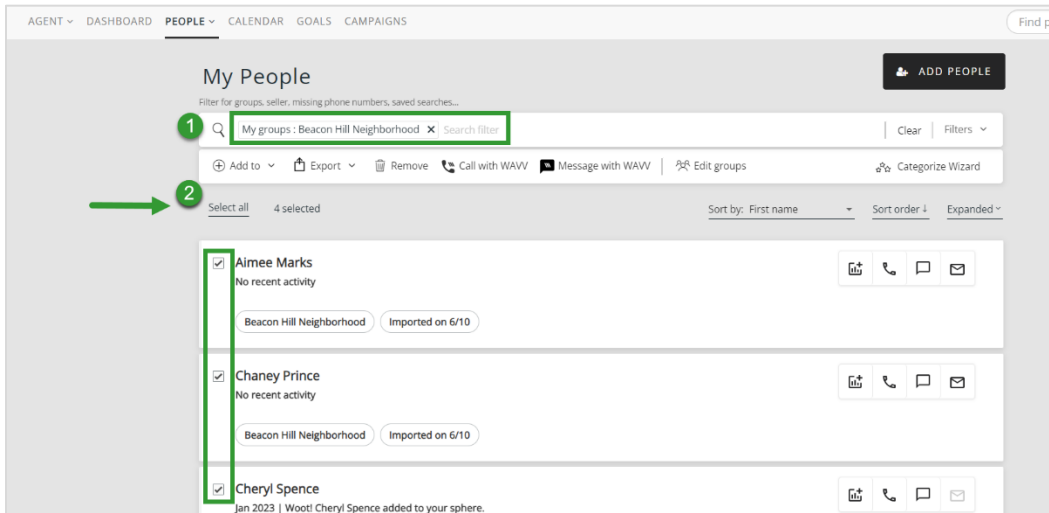
Choose all groups you want to add the contacts to using the **checkboxes**.

Select **Done** at the bottom of the popup box when finished to save your selections.



Add the Group to Neighborhood News, Listing Announcements, Campaigns, etc.

Now that your groups have been set up, you can quickly and easily assign MoxiEngage® touchpoints such as Neighborhood News, Listing Announcements and Campaigns.

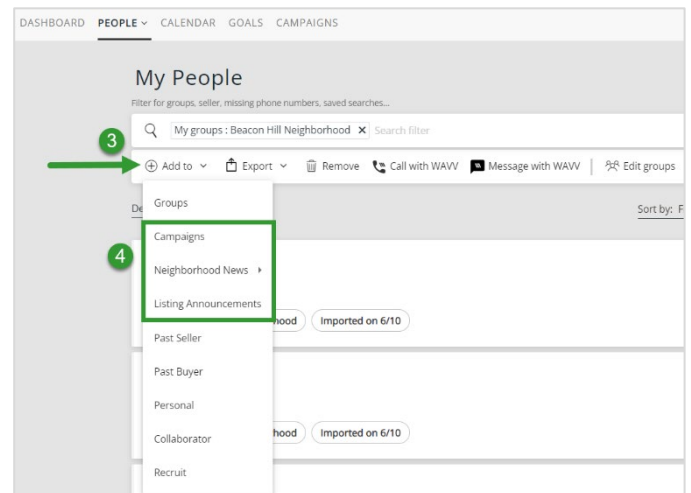


1. First, filter for your **group name**.

2. Then use **Select All** to select all the names in the group.

3. Click **Add to** and select the touchpoint from the drop-down menu.

4. Follow the prompts for the **touchpoint** you selected to complete the process of adding the touchpoint to your group!



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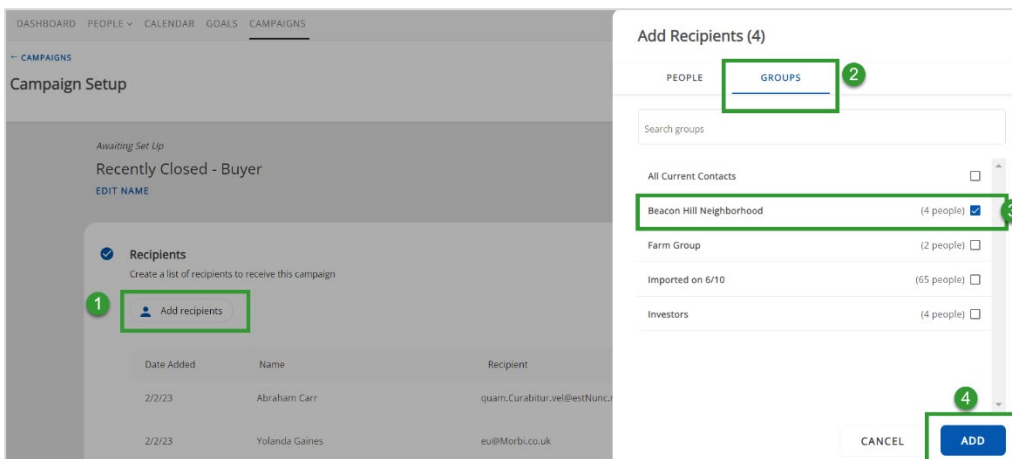
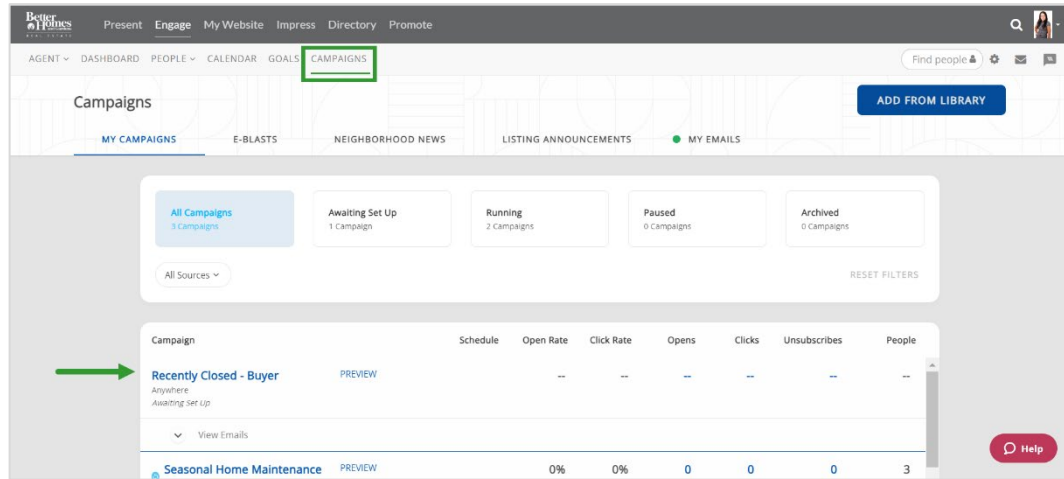
Add the Group to Campaigns from the Campaign Dashboard

You can also make use of your groups when setting up and running campaigns from the Campaign dashboard in MoxiEngage®.

Select **Campaigns** from the main menu.

Your existing campaigns will be listed on the dashboard. From here, you can choose from your existing campaigns or use the "Add Library" button to add additional campaigns.

Click the **campaign** that you would like to share with your Group to open the setup screen.



1. Click the **Setup** button, then the **Add Recipients** button.

2. Select the **Groups** tab

3. Select the applicable group with the **check box**.

4. Click **Add**.

Click **Save** on the next screen to be sure all contacts in your group will be added to this campaign when the campaign is 'running'. (If you haven't run the campaign yet, click **Run Campaign**, otherwise click **Done**.)

Any new contacts you add to the group in My People will automatically be added to the campaign.

Bonus! If you also use MoxiPresent, you can select groups you have set up in MoxiEngage when emailing presentations. Email a single client or a client group, through the Actions menu and the Pages tab.