MoxiEngage®

Getting Started Guide

MoxiEngage is your devoted sidekick: keeping you on task and in flow, syncing and updating info and insights about your clients to help strengthen relationships with your sphere of influence.
(Click the blue links for more information or how-to steps.)

Access

To access MoxiEngage, go to **The Greenhouse**.

- Open **The Greenhouse** page
- From the menu on the left, click **Tools and Resources**
- Scroll down to find the **MoxiEngage** tile

Connect to email

When you login for the first time, you'll be able to sync your contacts, email and calendar from your synced email account. Follow the prompts as you login.

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Migrate Contacts

You will have the option to use the Migration Tool to migrate contacts from one of these databases:

- Zap® Contact Data
- Market Leader® Contact Data

Find Migration Resources on the Resource Hub.

But you can also import contacts from a spreadsheet.
Microsoft®
Gmail®
MoxiEngage
Manual Migration from Zap®

Set your GCI Goal

Setting a goal drives your performance just as much as the right tools! Enter your Gross Commission Income Goal into MoxiEngage, and let the system help you take the daily steps needed to make your goal a reality!

Set your GCI goal

Update your Preferences

Changing your preferences can help you to make MoxiEngage work for you. The Engage Settings allows you to manage your leads providers, edit your transaction tasks and much more so that they work for you.

Engage Settings
Task Manager

Organize your People	When you have new people added to MoxiEngage, they will be "Uncategorized". You can put your people in the correct section of the sales flow or organize them as a Personal contact or Collaborator. Organize your People Stay top of mind with all your people with Touchpoints: Neighborhood News Listing Announcements and Sending Listing Announcements Special Dates Saved Searches To help stay on top of transactions for your client add them to a Sales Flow zone. Sales Flow

Add Campaigns from the Library	Campaigns allow you to connect with your sphere of influence via a collection of emails. You can send these collections, or campaigns, as a specific date or sequential campaign. Before you start sending them, review and add the ones you want from the Library. Campaigns

Help	The MoxiWorks home page for MoxiEngage has a variety of help articles that can assist. Search for topics, log a ticket or get in touch with a representative. For an overview, please click this link.

Daily Best Practices

Now that you've got everything set up, follow these simple daily best practices to stay top of mind with your leads and sphere of influence. Make use of the dashboard to stay up to date and top of mind with your people!

Stay in Flow

Your Stay in Flow module will display 5 contacts a day for you to reach out to. These contacts will be displayed based on how recently they have been contacted by you in the past. Use touchpoints to reach out.

Stay in Flow

Sales Flow

Each Sales Flow zone is a milestone for an individual client's progress towards a successful transaction. These milestones each have tasks for you to customize and complete to help you stay on top of the transaction. As you continue to complete tasks, move your client's transaction through the zones of the Sales Flow until you're ready to close.

Sales Flow

BONUS

★★★

Review your Email Signature

- In the top right corner, click the drop-down menu next to your profile photo
- Select My Account
- On the left-side in the navigation pane, click My Brand

Review your Signature

Create your Agent MoxiWebsite

Create your Website