



First time – MoxiEngage Guide



The purpose of this document is to guide new users through MoxiEngage and the email syncing process.

Before you begin ...

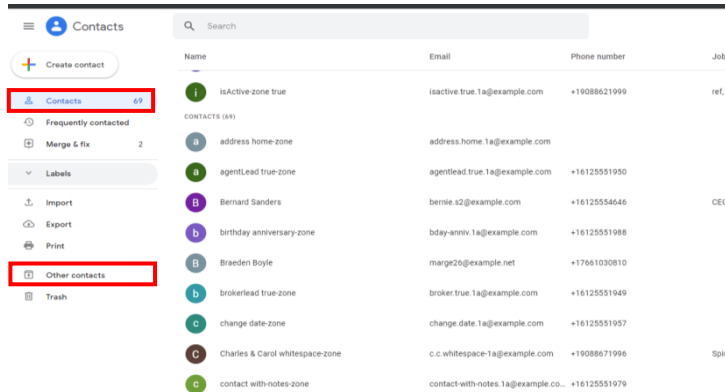
Things to do before setting up Engage:

Log into your email client (Gmail, Google Apps, or Office 365)

> Go to your contacts, ensure that any contacts you do NOT want to be synced with Engage are moved outside of the main "Contacts" folder in your email client.

- In Google Contacts, this would be the "Other Contacts" folder.
- In Office 365, this can be any other folder you create outside of the main "Contacts" folder.

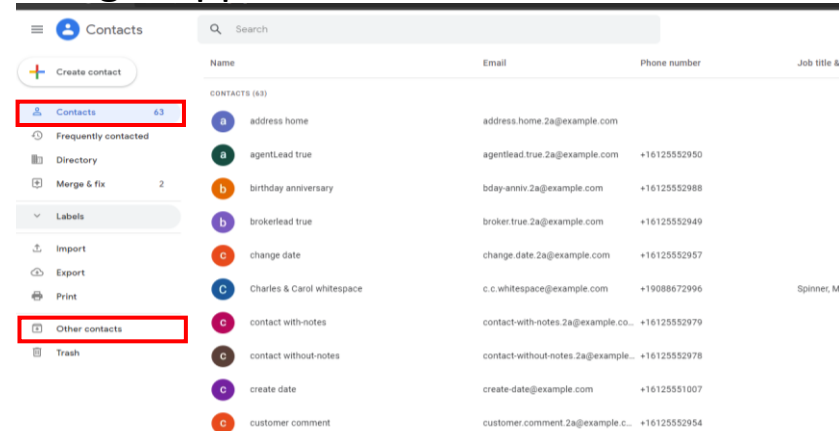
Gmail



Contacts = Main folder

Other Contacts = Contacts here will not sync with Engage

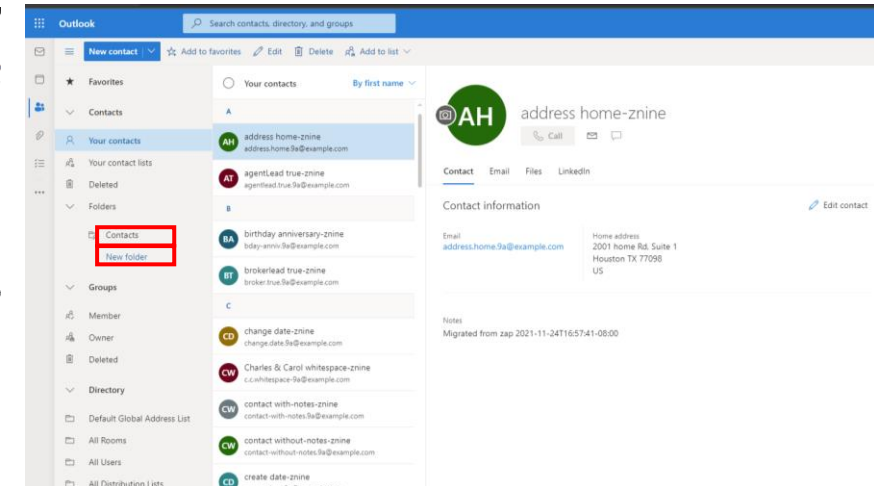
Google Apps for Work



Contacts = Main folder

Other Contacts = Contacts here will not sync with Engage

Office 365



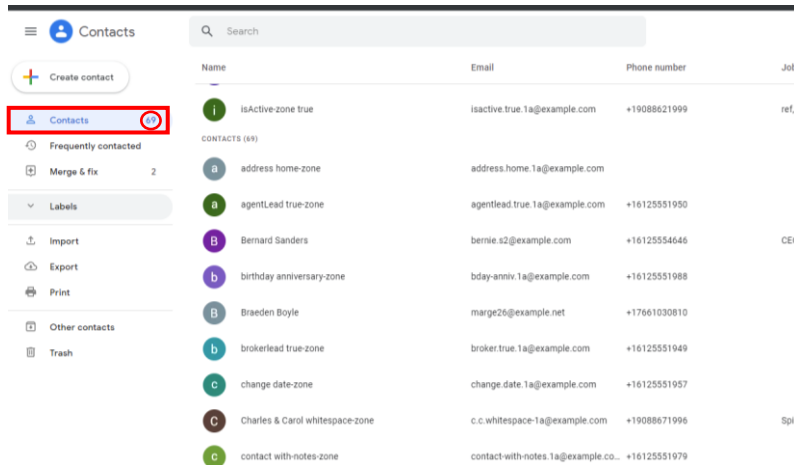
Contacts = Main folder

Any contacts placed in a new folder will be outside of the main Contacts folder

Things to do before setting up Engage:

- > Take note of the number of contacts in your email client.

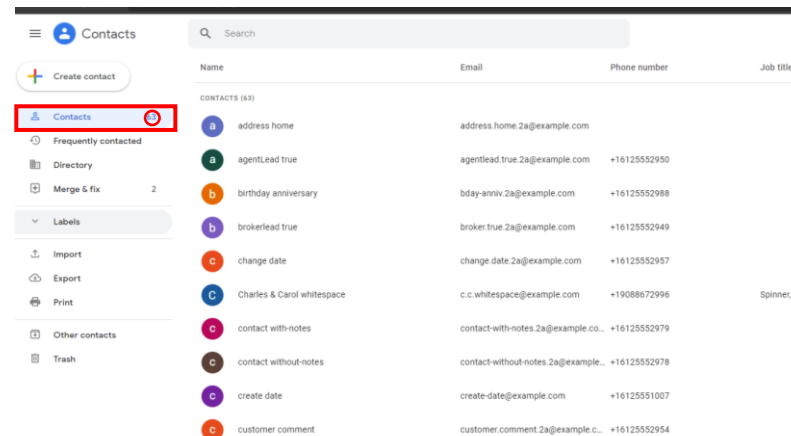
Gmail



Name	Email	Phone number	Job
isActive-zone true	isactive.true.1a@example.com	+19088621999	ref, t
address home-zone	address.home.1a@example.com		
agentLead true-zone	agentlead.true.1a@example.com	+16125551950	
Bernard Sanders	bernie.s2@example.com	+16125554646	CEO,
birthday anniversary-zone	bday-anniv.1a@example.com	+16125551988	
Braeden Boyle	marge26@example.net	+17661030810	
brokerlead true-zone	broker.true.1a@example.com	+16125551949	
change date-zone	change.date.1a@example.com	+16125551957	
Charles & Carol whitespace-zone	c.c.whitespace.1a@example.com	+19088671996	Spin
contact with notes-zone	contact-with.notes.1a@example.co...	+16125551979	

Total Number of Contacts

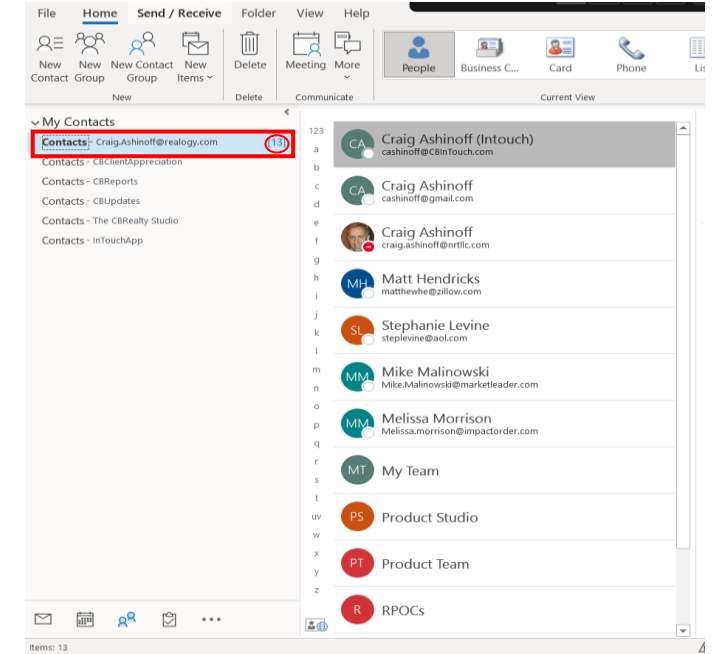
Google Apps for Work



Name	Email	Phone number	Job title &
address home	address.home.2a@example.com		
agentLead true	agentlead.true.2a@example.com	+16125552950	
birthday anniversary	bday-anniv.2a@example.com	+16125552988	
brokerlead true	broker.true.2a@example.com	+16125552949	
change date	change.date.2a@example.com	+16125552957	
Charles & Carol whitespace	c.c.whitespace@example.com	+19088672996	Spinner, Ma
contact with notes	contact-with.notes.2a@example.co...	+16125552979	
contact without notes	contact-without.notes.2a@example...	+16125552978	
create date	create-date@example.com	+16125551007	
customer comment	customer.comment.2a@example.co...	+16125552954	

Total Number of Contact

Office 365



File	Home	Send / Receive	Folder	View	Help
New Contact	New Group	New Contact Group	New Items	Delete	Meeting More
New	New	New	Delete	Communicate	Current View

My Contacts
Contacts - Craig.Ashinoff@realogy.com (13)
Contacts - CBClientApprentition
Contacts - CBReports
Contacts - CBUpdates
Contacts - The CBReally Studio
Contacts - inTouchApp

123	CA	Craig Ashinoff (Intouch)
a	CA	cashinoff@CbinTouch.com
b	CA	Craig Ashinoff
c	CA	cashinoff@gmail.com
d	CA	Craig Ashinoff
e	CA	craig.ashinoff@nrlc.com
f	MA	Matt Hendricks
g	MA	matthewhe@zillow.com
h	SL	Stephanie Levine
i	SL	steplevine@aol.com
j	MM	Mike Malinowski
k	MM	Mike.Malinowski@marketleader.com
l	MM	Melissa Morrison
m	MM	Melissa.morrison@impactorder.com
n	MT	My Team
o	PS	Product Studio
p	PT	Product Team
q	R	RPOCs
r		
s		
t		
uv		
w		
x		
y		
z		

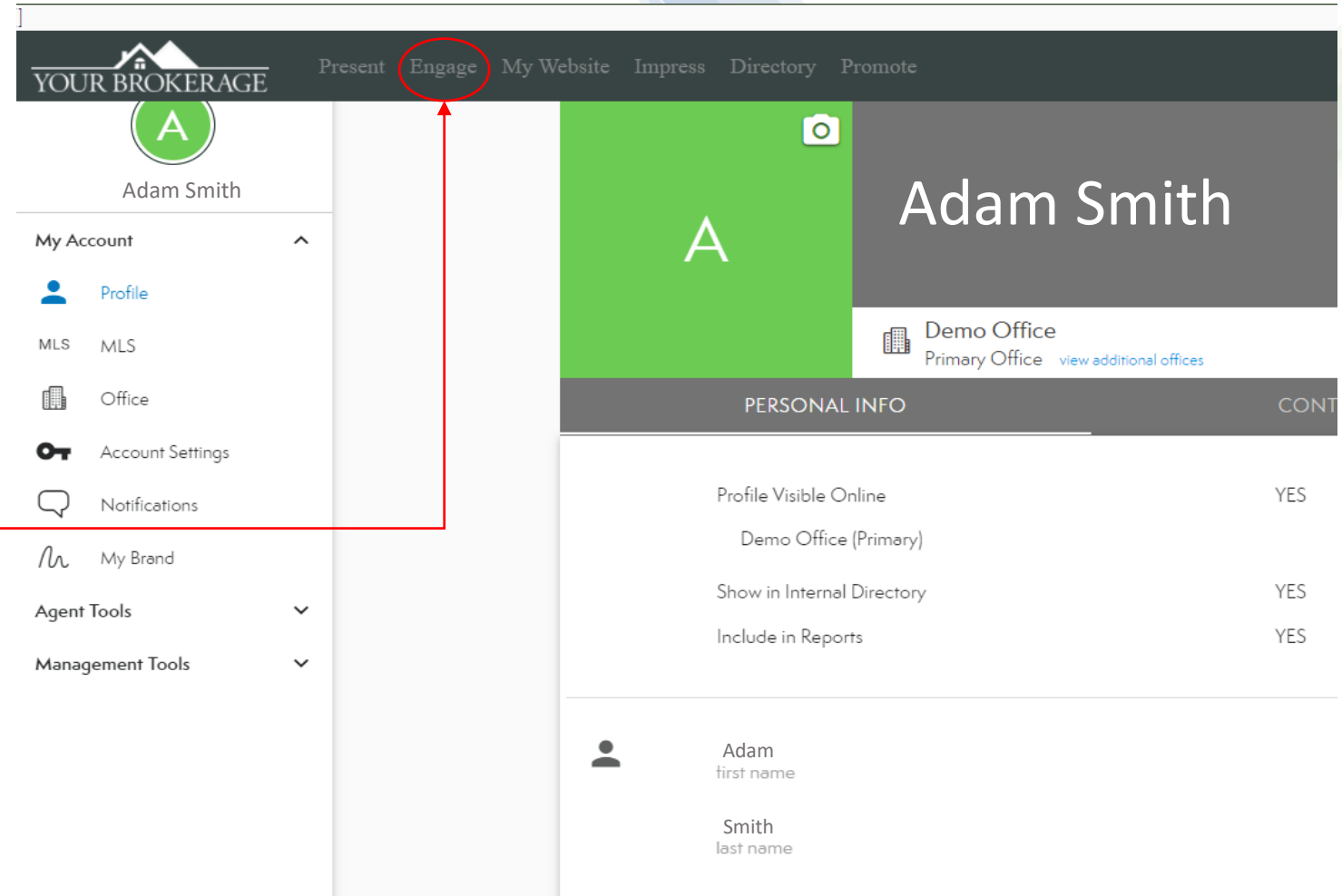
Note: In Office 365 the number of contacts shown includes your contact groups as well.

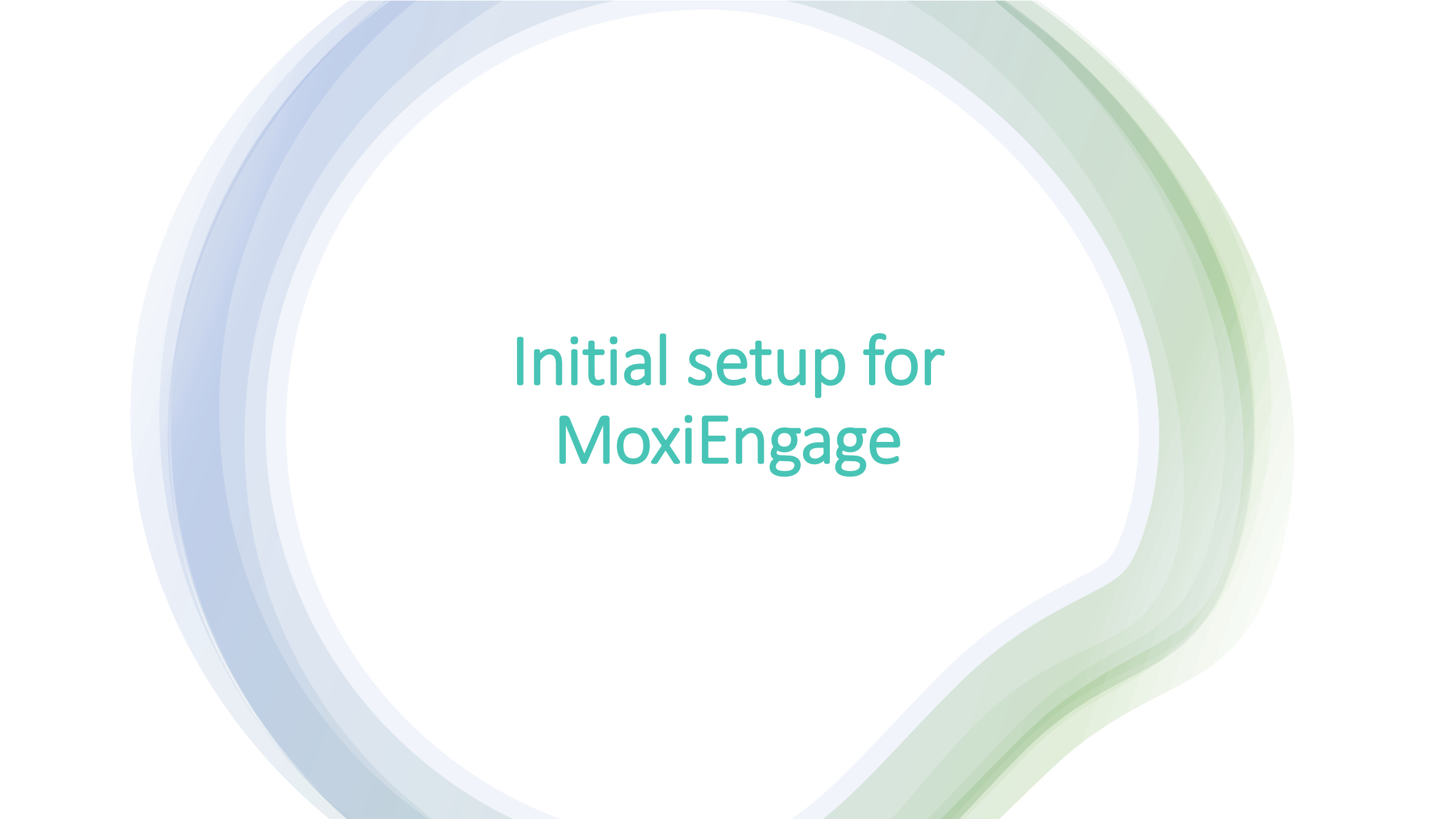
The background features a series of concentric circles in shades of blue and green, with a wavy line cutting through them from the bottom right.

How to access
MoxiEngage from your
brand extranet.

Navigate to MoxiWorks > MoxiEngage

1. Access the MoxiWorks suite from your [brand extranet].
2. This should take you to the [My Account > Profile] page.
3. Click [Engage] from the top navigation bar.





Initial setup for MoxiEngage

Upon your initial entry into MoxiEngage you will be presented with a “Welcome to MoxiEngage” screen.

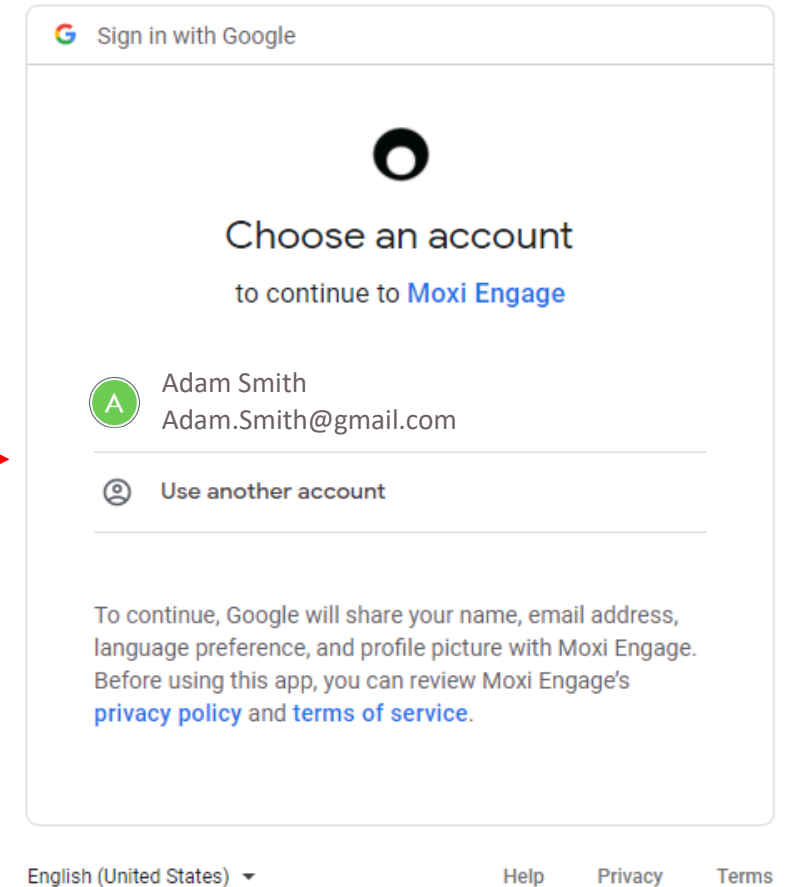
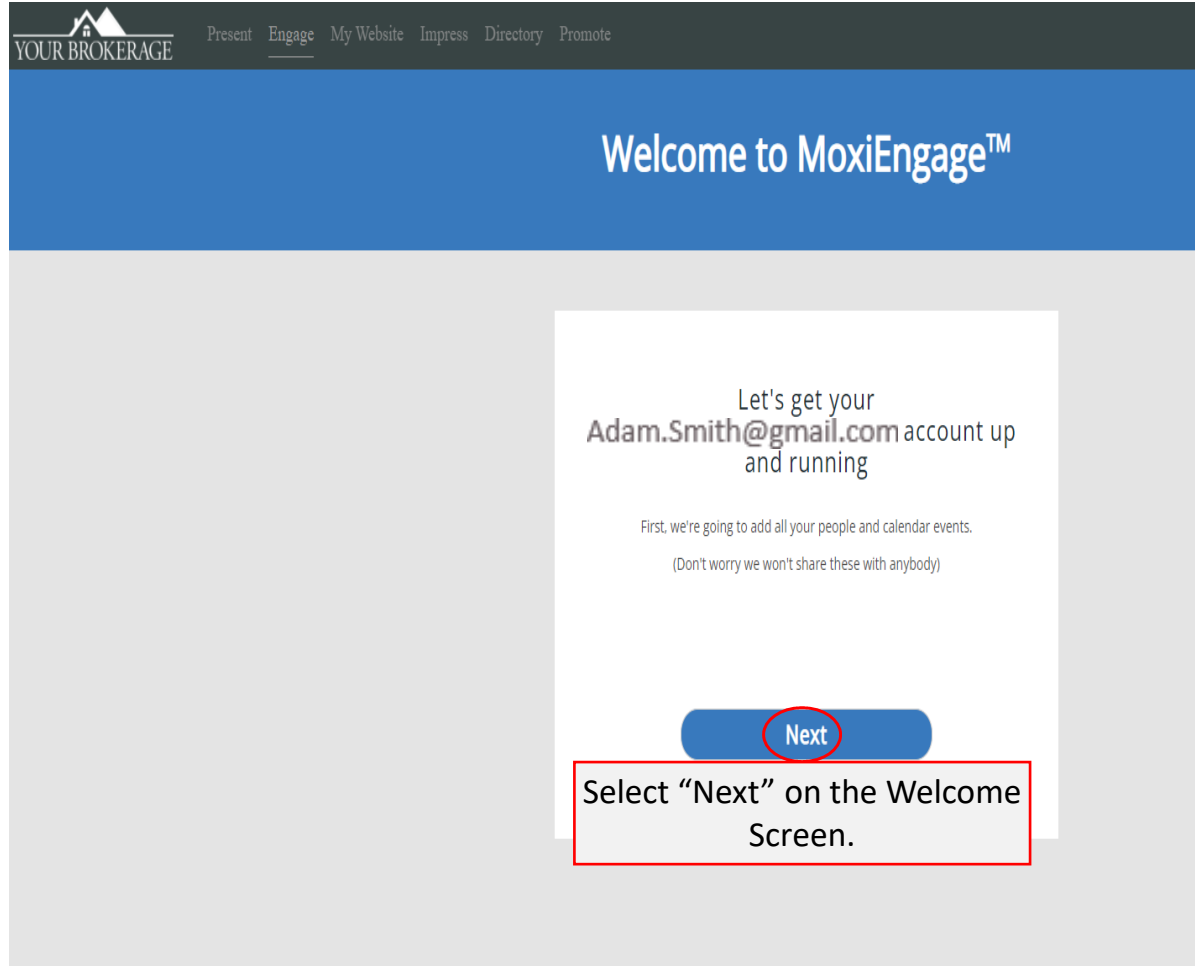
How your brokerage set up your company email addresses will determine what screens you see.

Navigate to the relevant slides for the email platform that your brokerage uses:

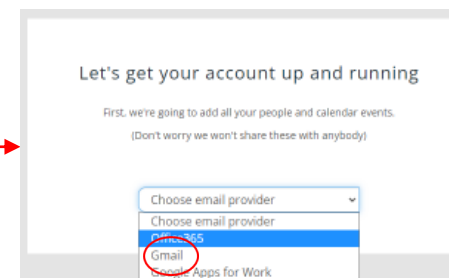
1. [Gmail - Click Here](#) – see slides 9 to 16
2. [Google Apps for Work – Click Here](#) - see slides 17 to 23
3. [O365 email Account – Click Here](#) – see slides 24 to 30

See slide 31 for a list of [things to do after completing your email sync](#) and **slide 32** for additional support/learning information for MoxiEngage.

Gmail Account



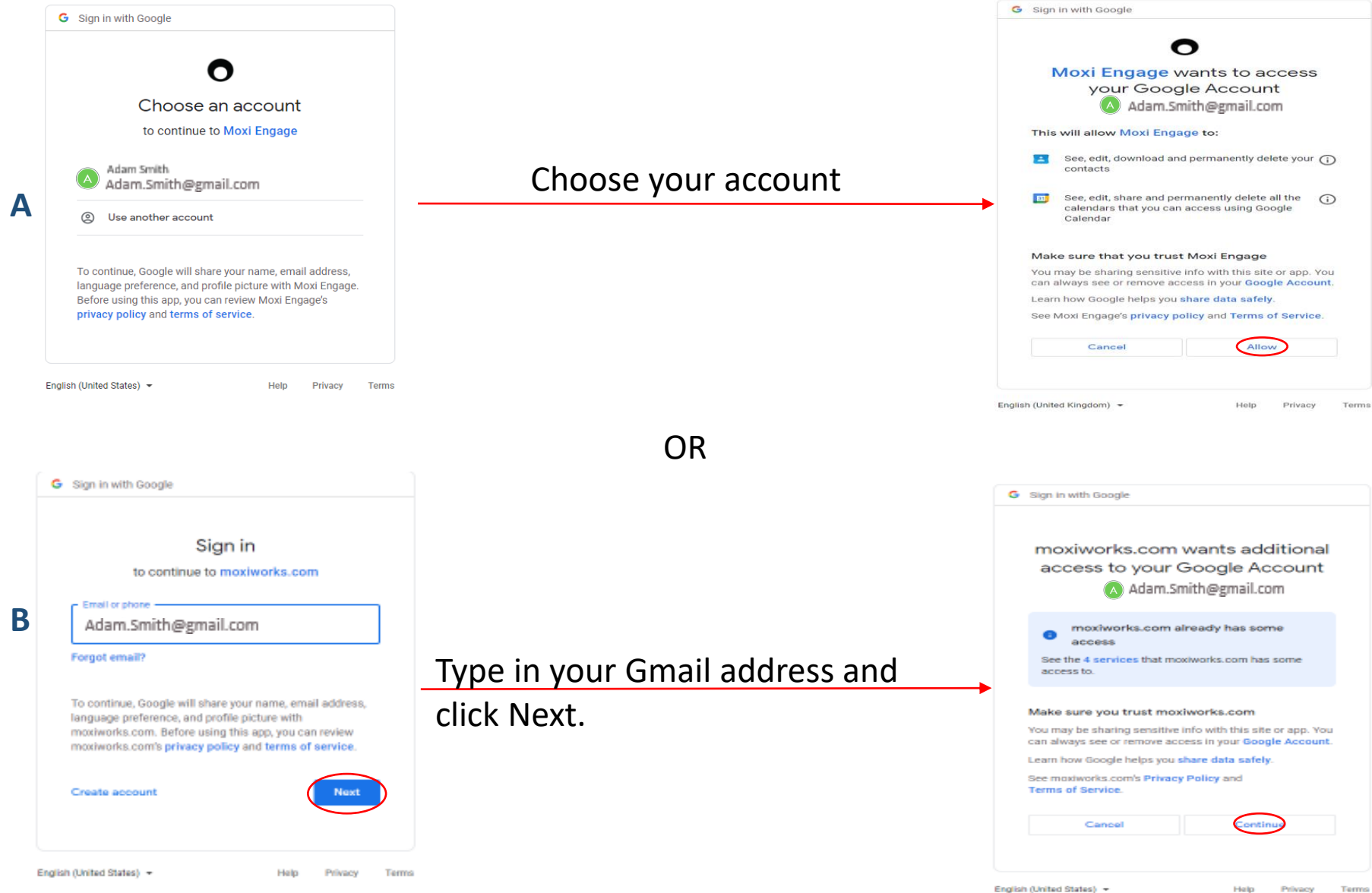
Note: For Agents **who have multiple accounts**, there will be a drop-down menu with the viable options displayed.



Select
Gmail

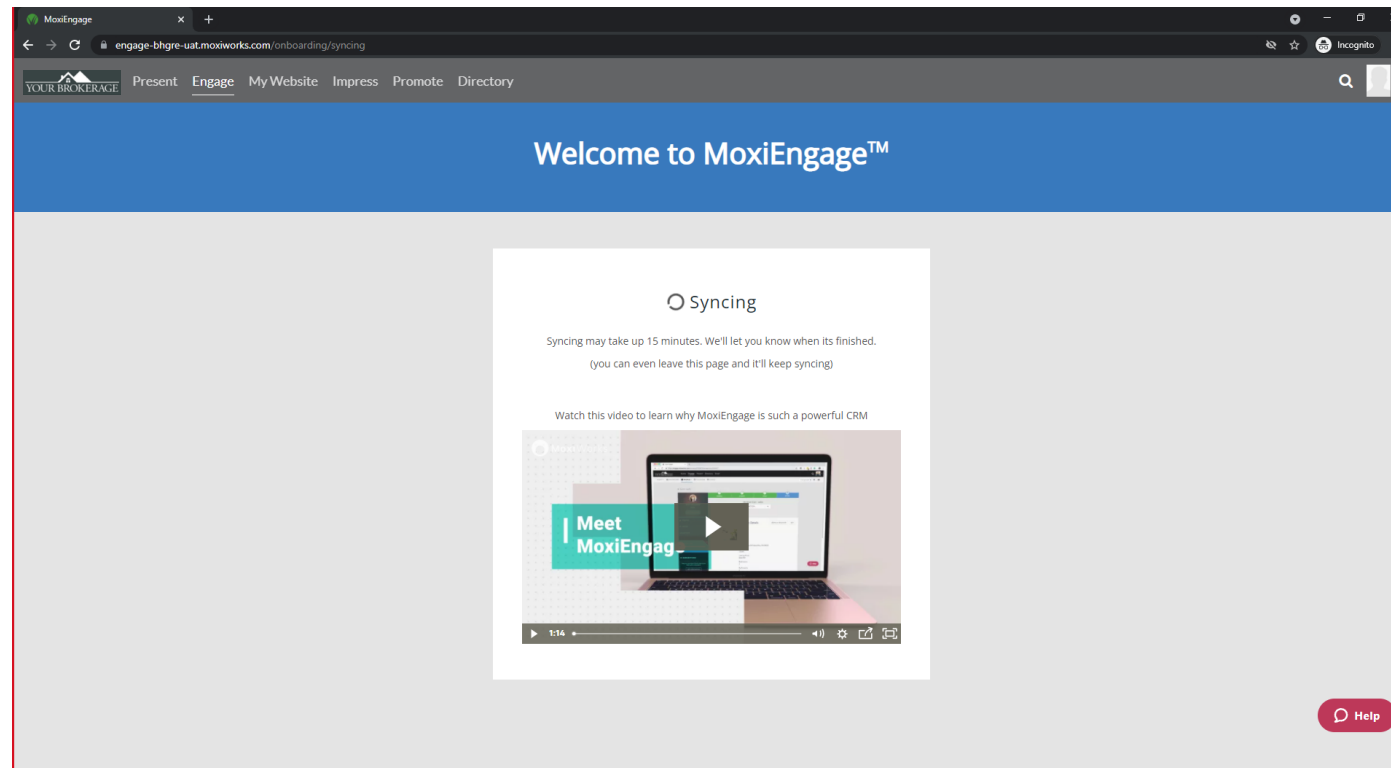
Gmail Account Access:

The screen(A or B) you get is based on how your Gmail account is set up.



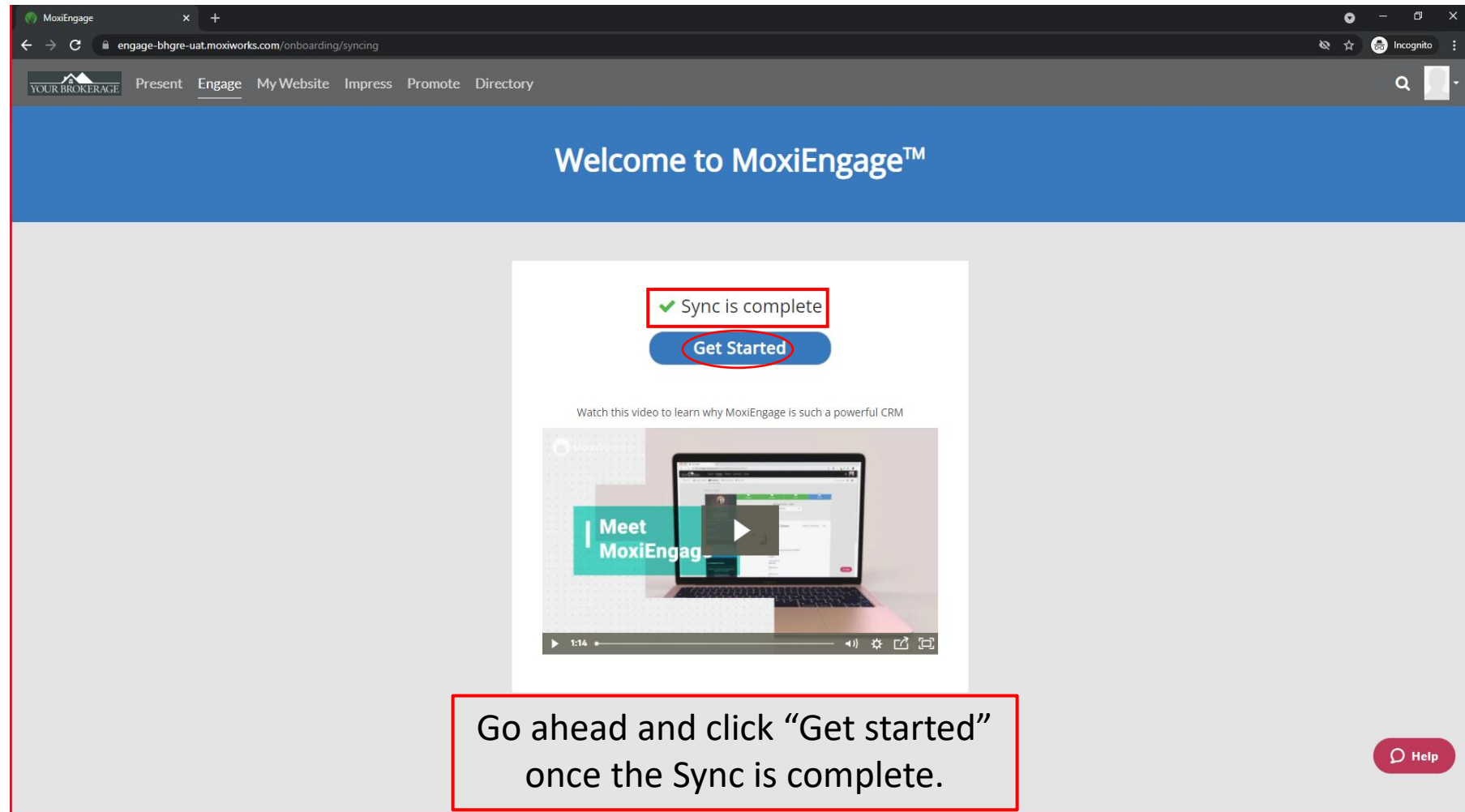
Once you finish choosing your account or type in your account, you will get a prompt to allow MoxiEngage to modify your data. Go ahead and click “Allow” or “Continue”.

Welcome to MoxiEngage – Syncing in progress screen

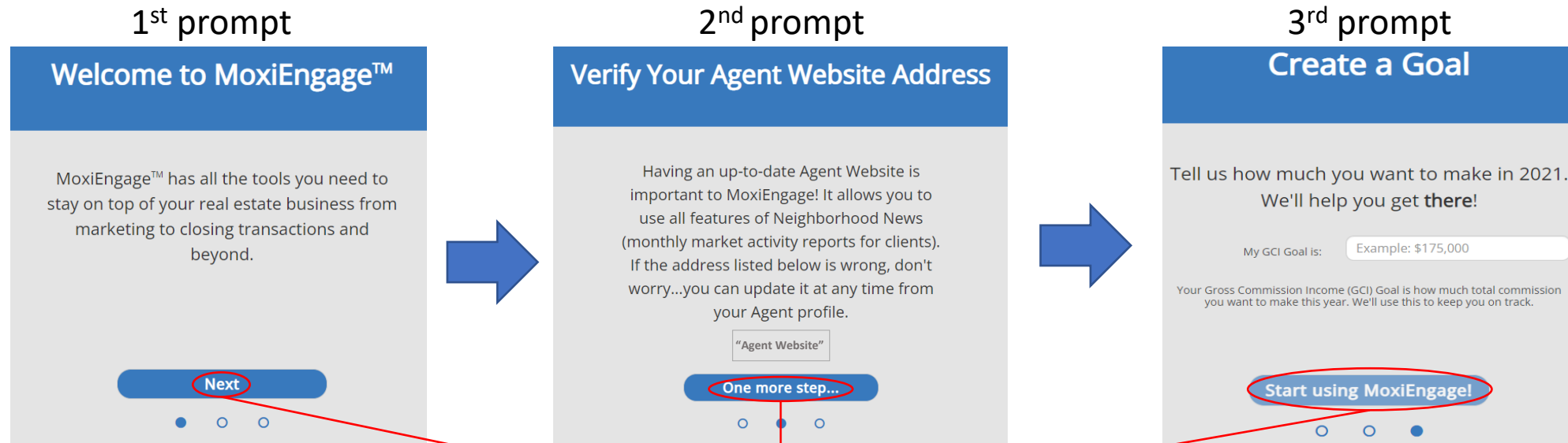


Feel free to watch the accompanying video for more information about MoxiEngage. If you want to do something else while you wait, you can since the syncing process will continue in the background uninterrupted.

Welcome to MoxiEngage – Syncing Complete Screen



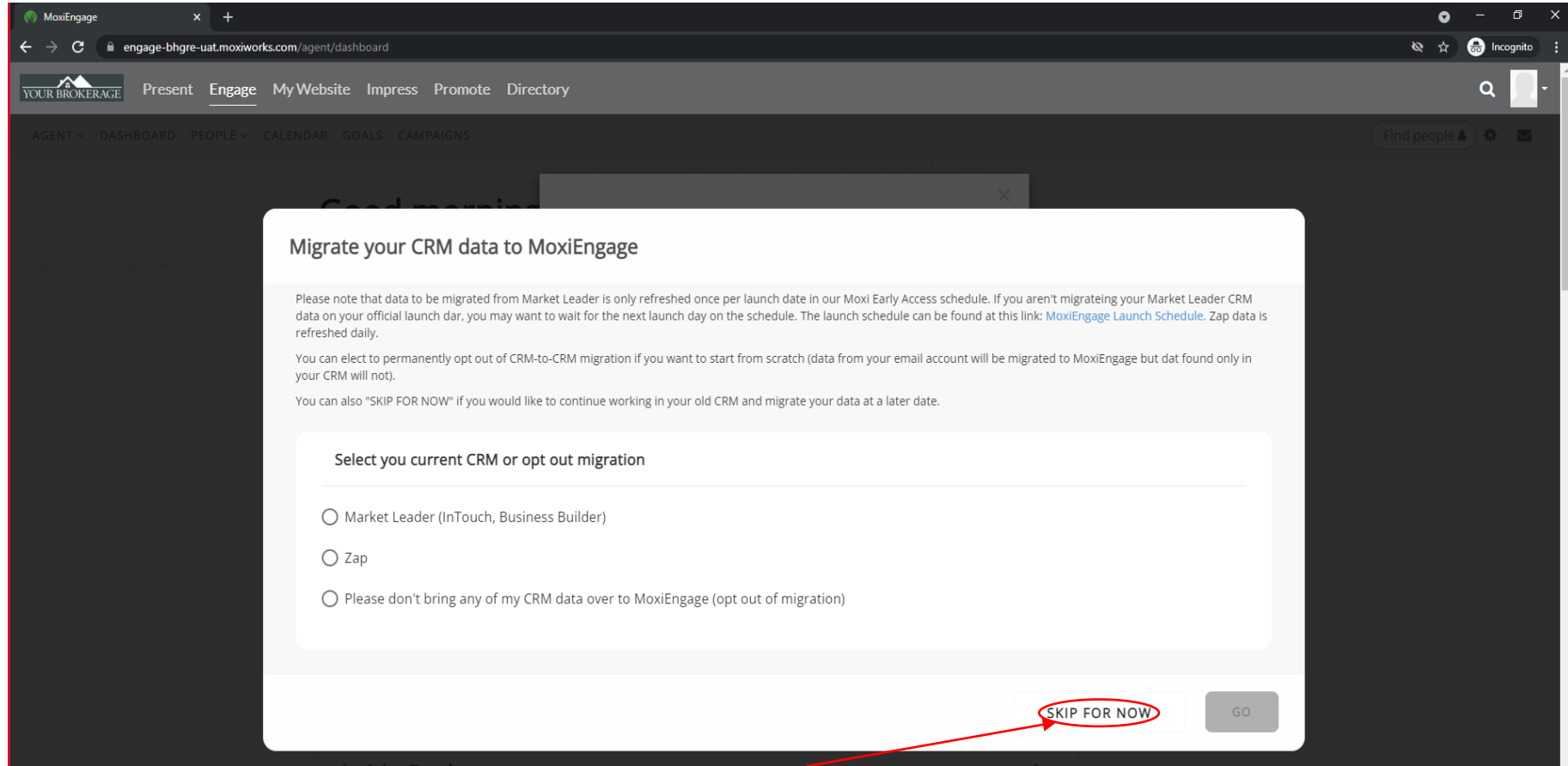
MoxiEngage- Once the Sync is complete follow the prompts:



After the email sync is complete, you will see the following prompts:

- On the 1st prompt read the message that is displayed and then Click "next".
- On the 2nd prompt read the message that is displayed and verify the website displayed and then Click "One more step...".
- On the 3rd prompt read the message that is displayed and enter your GCI goal and then click "Start using MoxiEngage".

If shown, Automated data migration prompt – Select “SKIP FOR NOW”.



The screenshot shows a web browser window with the MoxiEngage dashboard. A modal window titled "Migrate your CRM data to MoxiEngage" is displayed in the center. The modal contains the following text:

Please note that data to be migrated from Market Leader is only refreshed once per launch date in our Moxi Early Access schedule. If you aren't migrating your Market Leader CRM data on your official launch day, you may want to wait for the next launch day on the schedule. The launch schedule can be found at this link: [MoxiEngage Launch Schedule](#). Zap data is refreshed daily.

You can elect to permanently opt out of CRM-to-CRM migration if you want to start from scratch (data from your email account will be migrated to MoxiEngage but data found only in your CRM will not).

You can also "SKIP FOR NOW" if you would like to continue working in your old CRM and migrate your data at a later date.

Below the text is a section titled "Select your current CRM or opt out migration" with three radio button options:

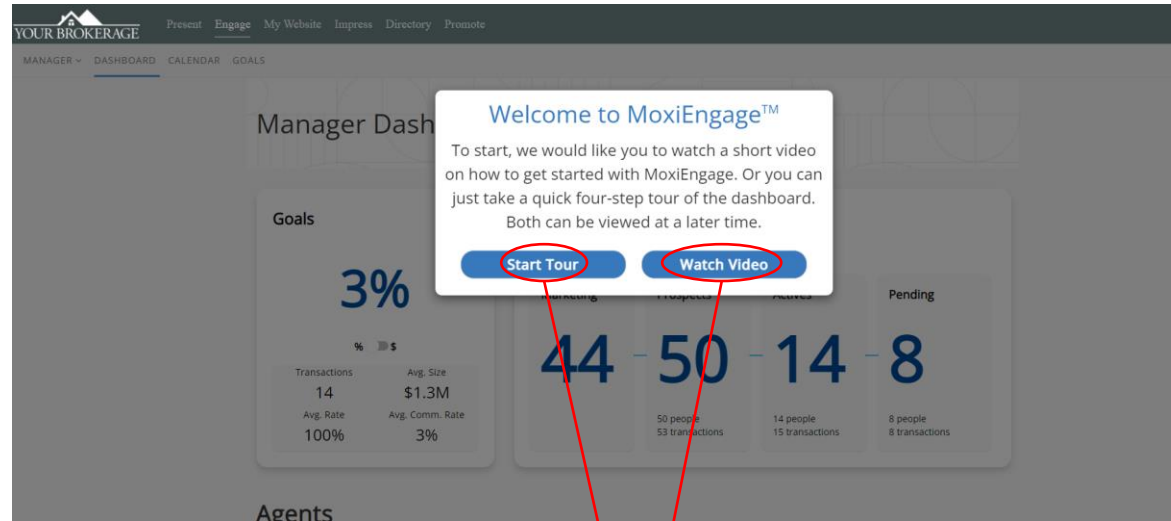
- ☐ Market Leader (InTouch, Business Builder)
- ☐ Zap
- ☐ Please don't bring any of my CRM data over to MoxiEngage (opt out of migration)

At the bottom right of the modal, there are two buttons: "SKIP FOR NOW" (highlighted with a red circle and a red arrow pointing to it) and "GO".

Since we want you to familiarize yourself with MoxiEngage first before doing the automated data migration. Please go ahead and select “SKIP FOR NOW”.

Do not worry, you will be able to select the automated data migration option afterward when you are ready.

Welcome to MoxiEngage : Start Tour or Watch Video

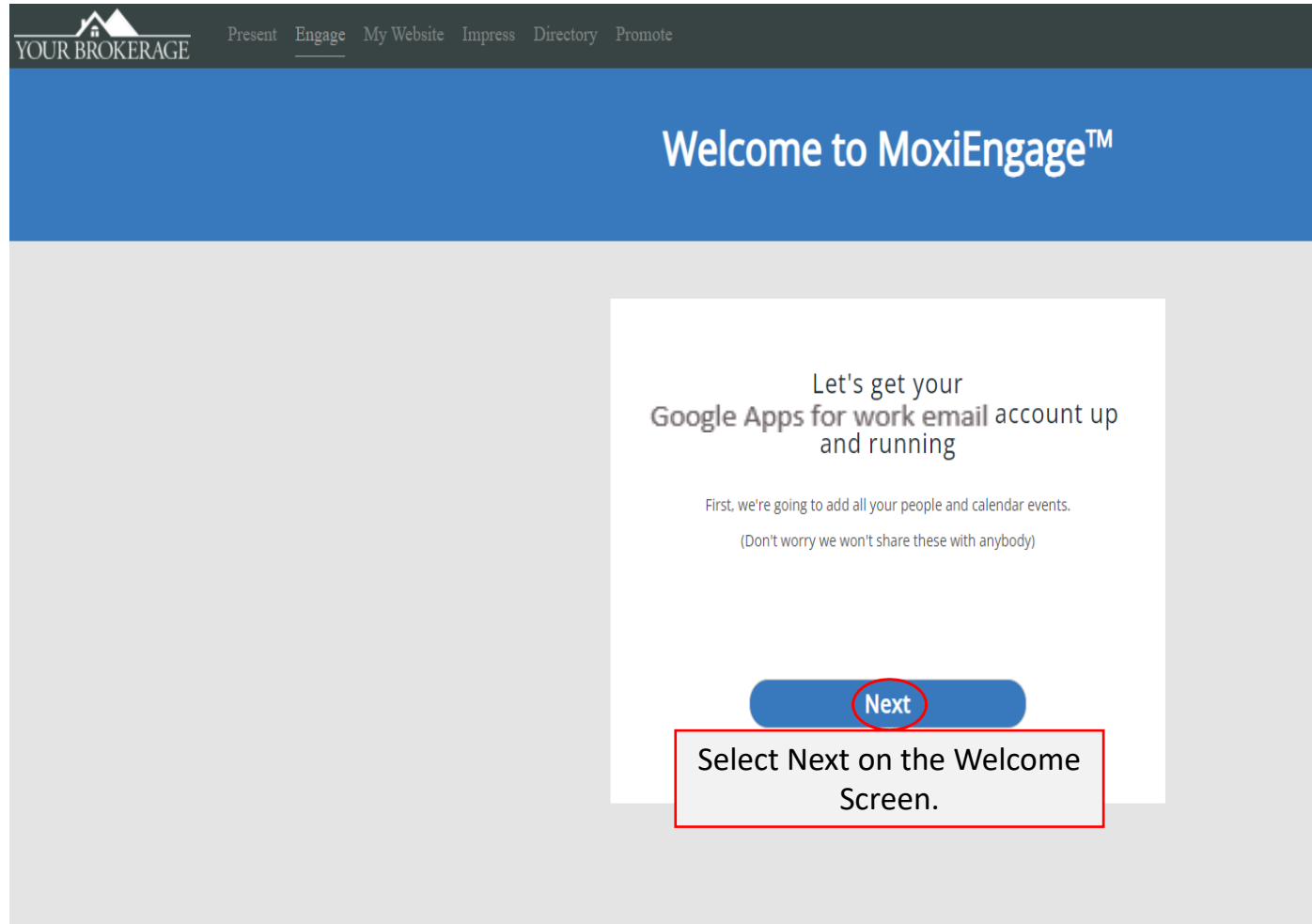


Go ahead and choose “Start Tour” and/or “Watch Video” to start familiarizing yourself with the interface and functions now. If you choose to skip, you can access the tour option later from settings menu (Gear Icon on the top right of the screen).

GMAIL - Sync process complete

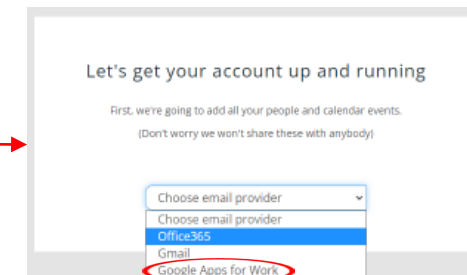
- Now please click [here](#) to go to a list of [things to do once the sync is complete](#), followed by support and educational links.

Google Apps for Work

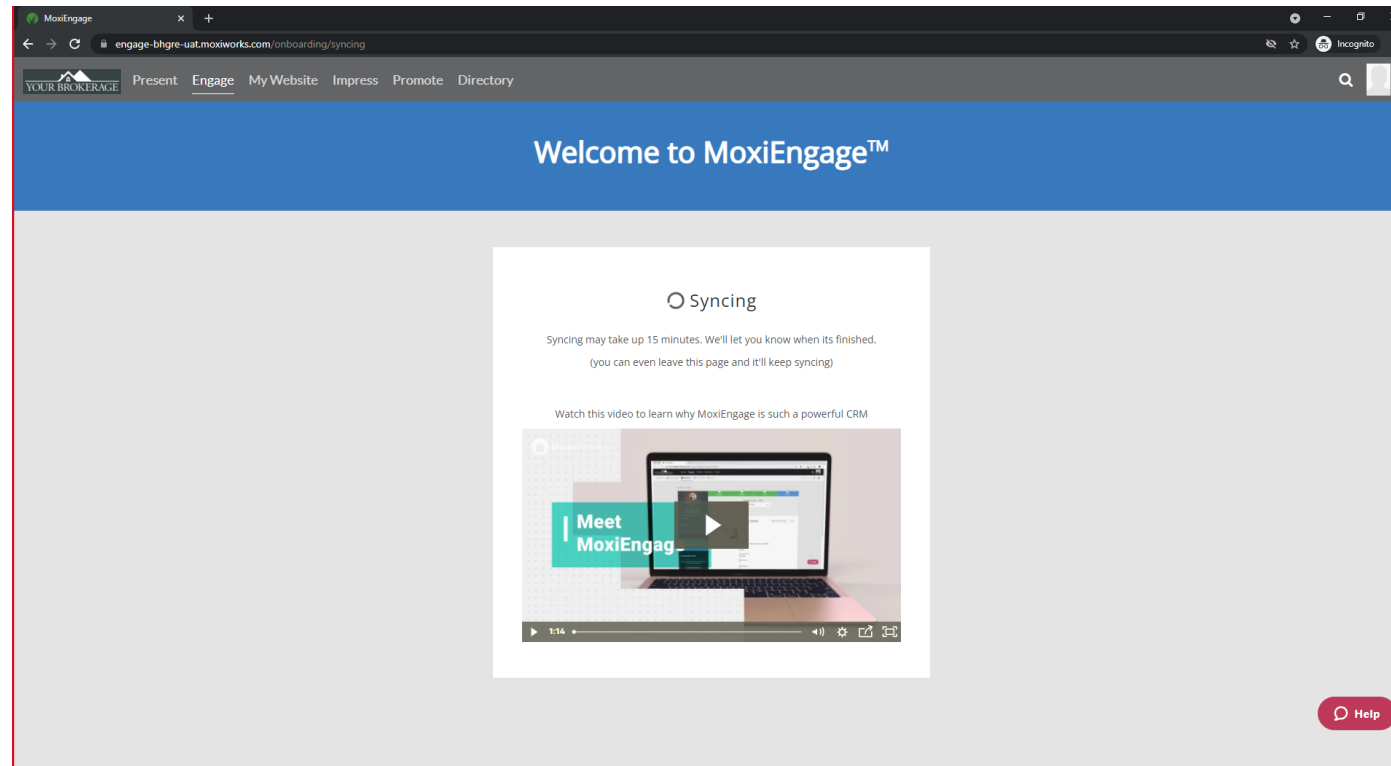


Note: For Agents **who have multiple accounts**, there will be a drop-down menu with the viable options displayed.

Select
Google
Apps for
Work

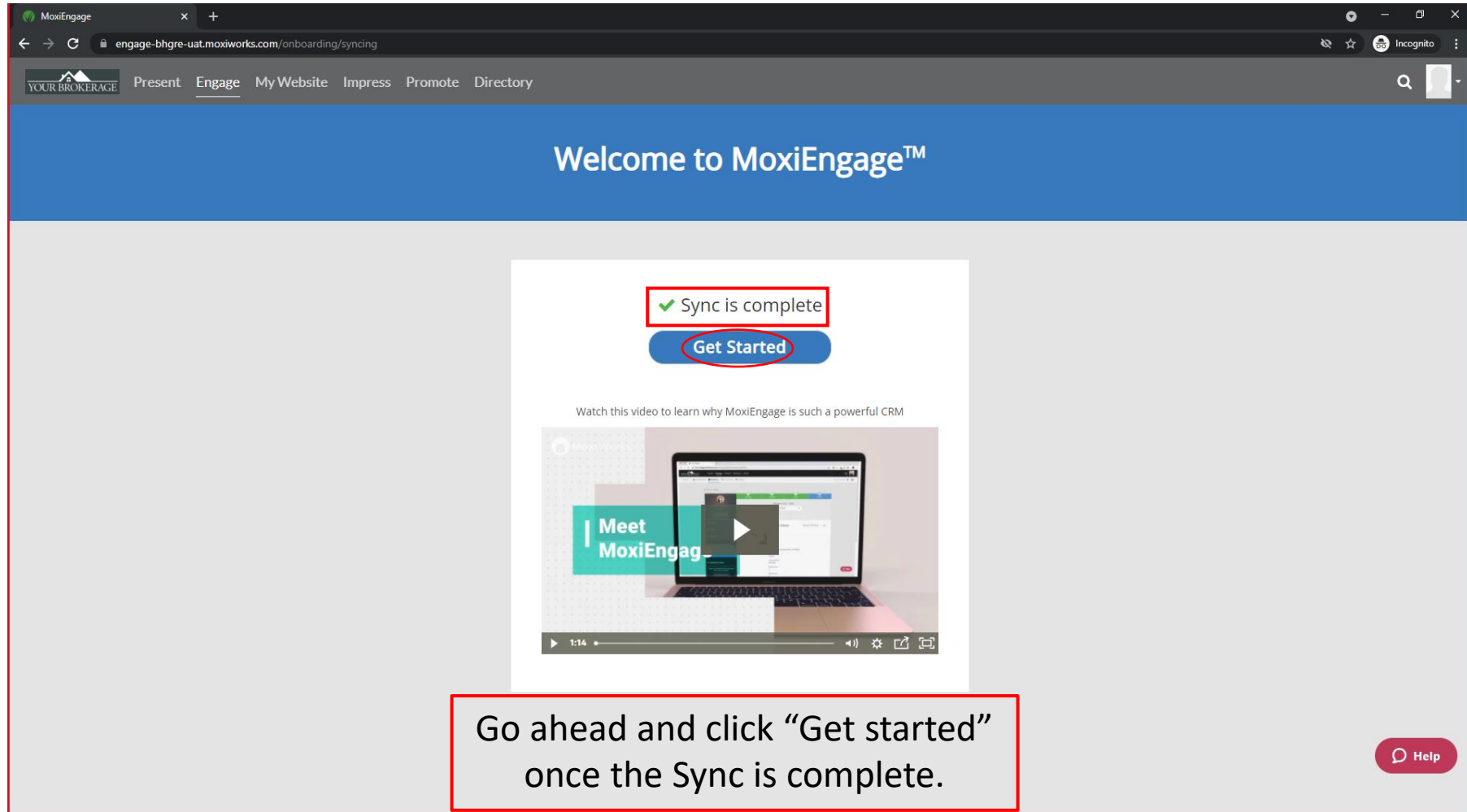


Welcome to MoxiEngage – Syncing in progress Screen

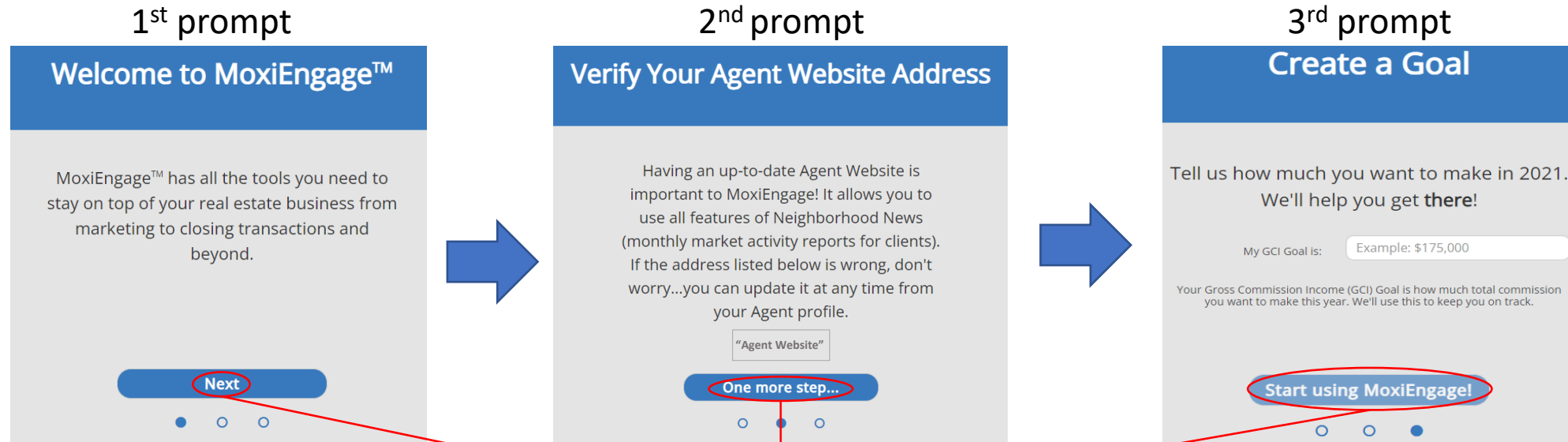


Feel free to watch the accompanying video for more information about MoxiEngage. If you want to do something else while you wait, you can since the syncing process will continue in the background uninterrupted.

Welcome to MoxiEngage – Syncing complete Screen



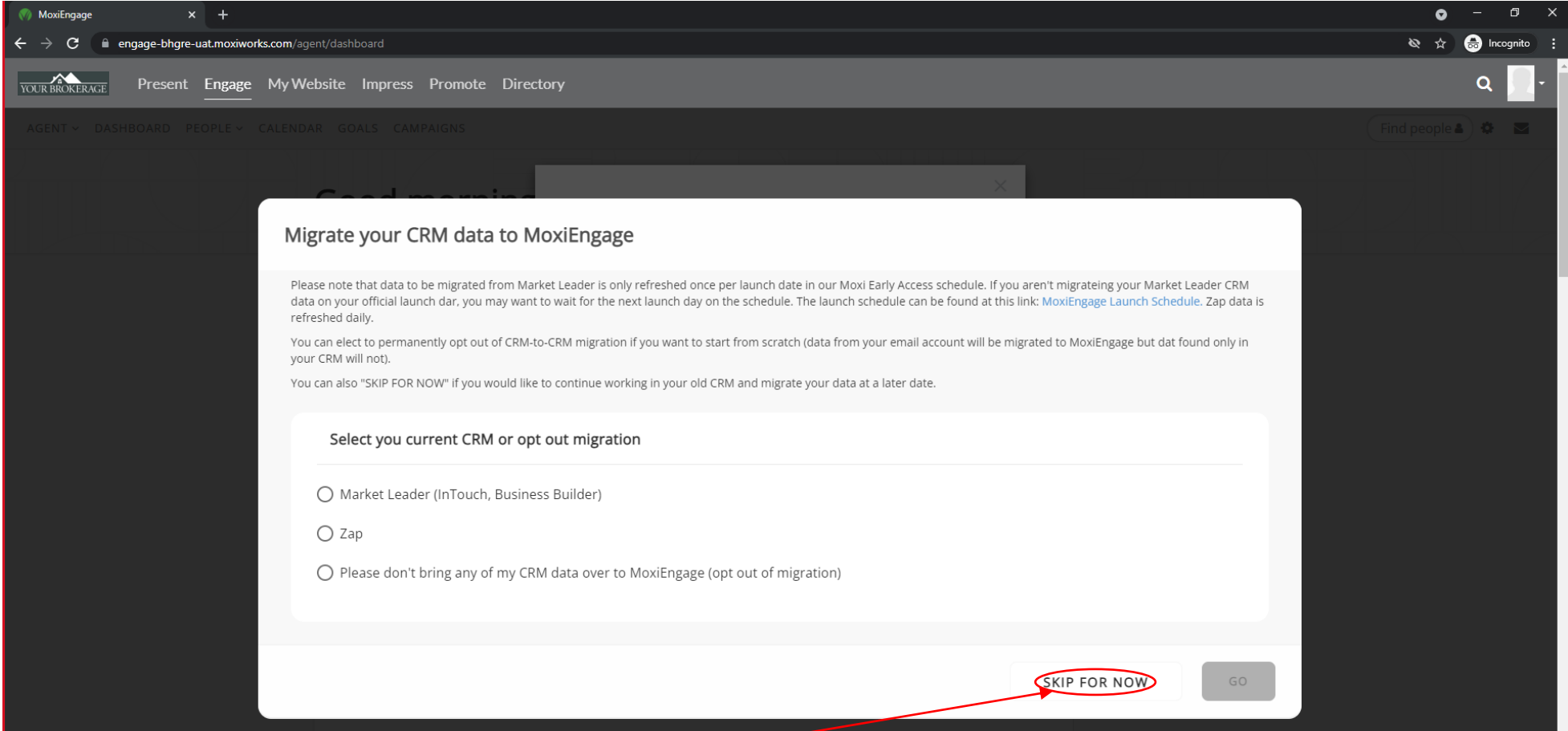
MoxiEngage- Once the Sync is complete follow the prompts:



After the email sync is complete, you will see the following prompts:

- On the 1st prompt read the message that is displayed and then Click "next".
- On the 2nd prompt read the message that is displayed and verify the website displayed and then Click "One more step...".
- On the 3rd prompt read the message that is displayed and enter your GCI goal and then click "Start using MoxiEngage".

If shown, Automated data migration prompt – Select “SKIP FOR NOW”.



The screenshot shows a web browser window with the MoxiEngage dashboard. A modal window titled "Migrate your CRM data to MoxiEngage" is displayed in the center. The modal contains the following text:

Please note that data to be migrated from Market Leader is only refreshed once per launch date in our Moxi Early Access schedule. If you aren't migrateing your Market Leader CRM data on your official launch dar, you may want to wait for the next launch day on the schedule. The launch schedule can be found at this link: [MoxiEngage Launch Schedule](#). Zap data is refreshed daily.

You can elect to permanently opt out of CRM-to-CRM migration if you want to start from scratch (data from your email account will be migrated to MoxiEngage but dat found only in your CRM will not).

You can also "SKIP FOR NOW" if you would like to continue working in your old CRM and migrate your data at a later date.

Below the text, there is a section titled "Select you current CRM or opt out migration" with three radio button options:

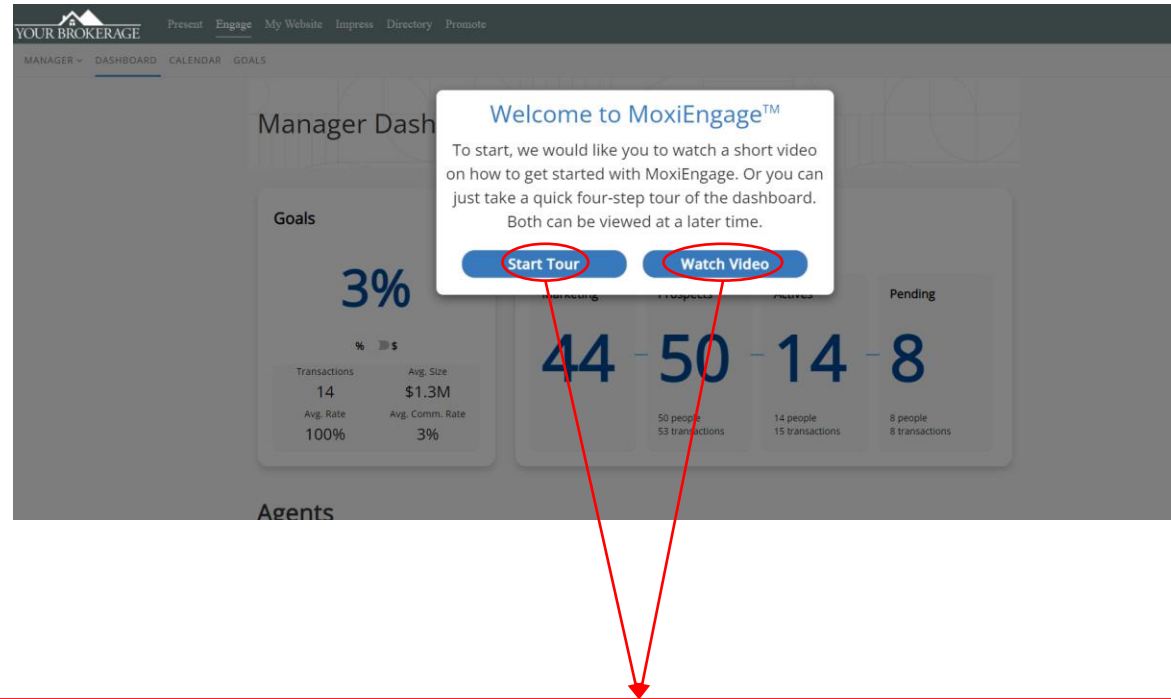
- ☐ Market Leader (InTouch, Business Builder)
- ☐ Zap
- ☐ Please don't bring any of my CRM data over to MoxiEngage (opt out of migration)

At the bottom right of the modal, there are two buttons: "SKIP FOR NOW" (which is circled in red with an arrow pointing to it) and "GO".

Since we want you to familiarize yourself with MoxiEngage first before doing the automated data migration. Please go ahead and select “SKIP FOR NOW”.

Do not worry, you will be able to select the automated data migration option afterward when you are ready.

Welcome to MoxiEngage : Start Tour or Watch Video

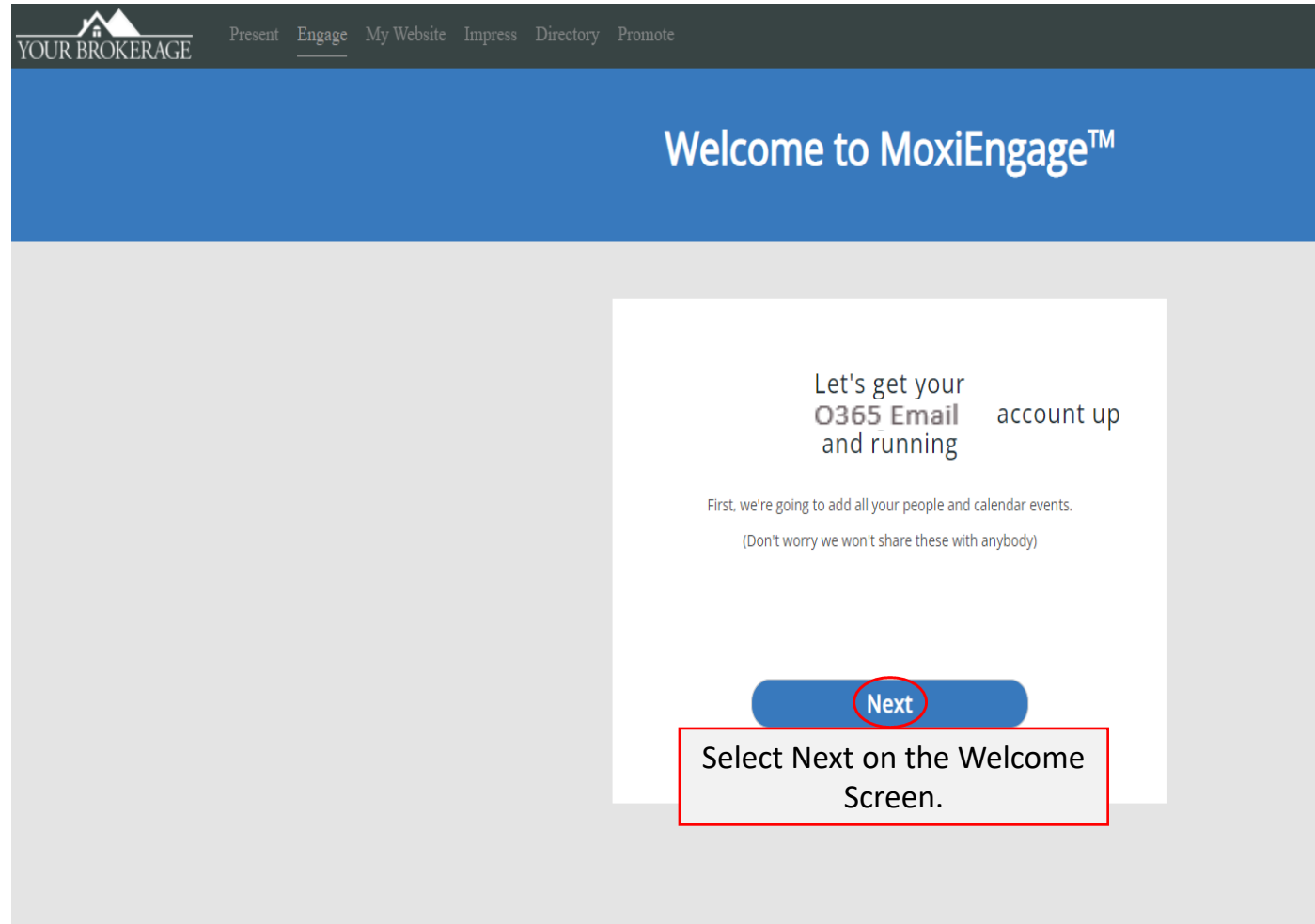


Go ahead and choose “Start Tour” and/or “Watch Video” to start familiarizing yourself with the interface and functions now. If you choose to skip, you can access the tour option later from settings menu (Gear Icon on the top right of the screen).

Google Apps for work - Sync process complete

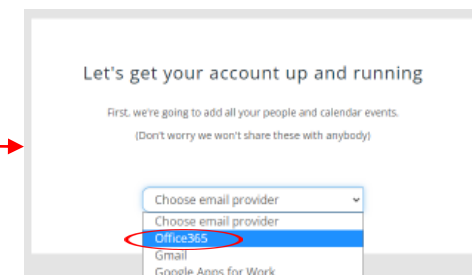
- Now please click [here](#) to go to a list of [**things to do once the sync is complete**](#), followed by support and educational links.

O365 Account

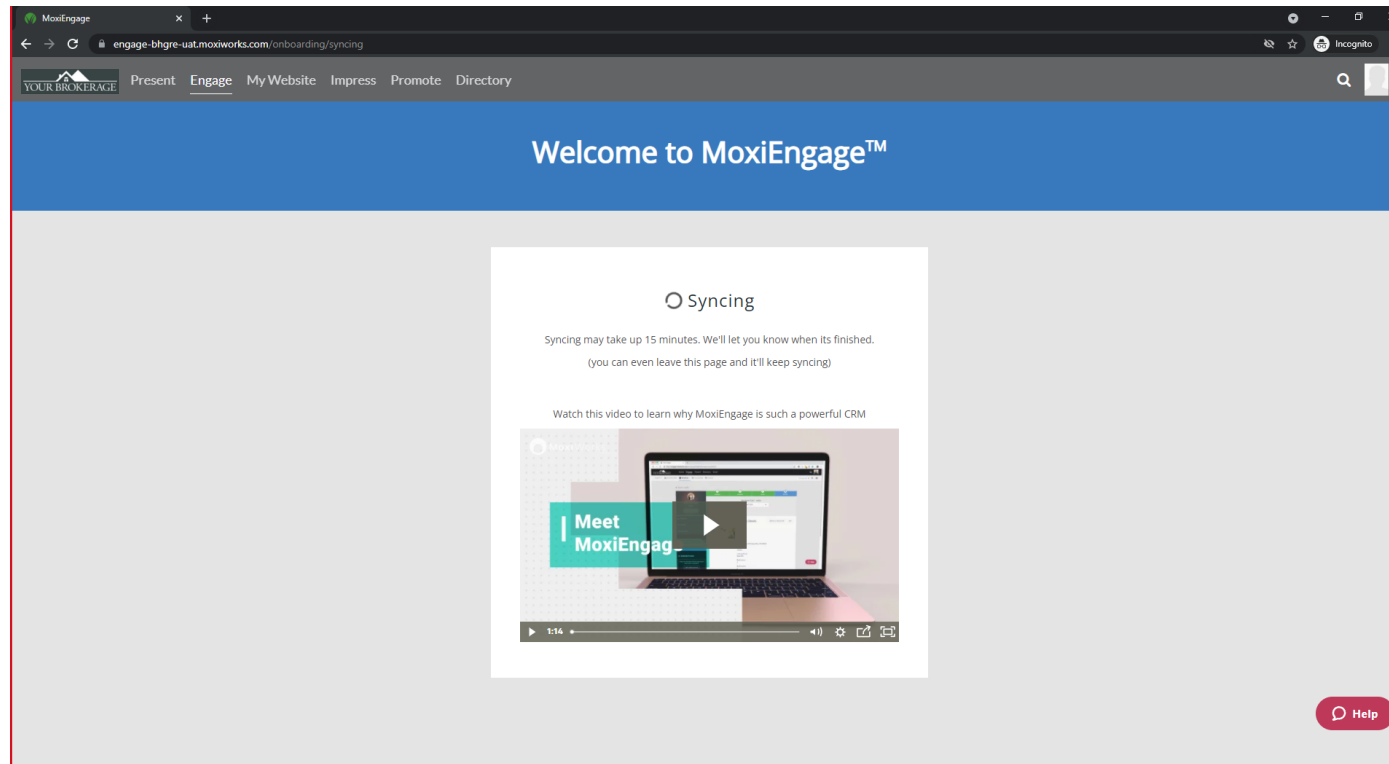


Note: For Agents **who have multiple accounts**, there will be a drop-down menu with the viable options displayed.

Select
Google
Apps for
Work

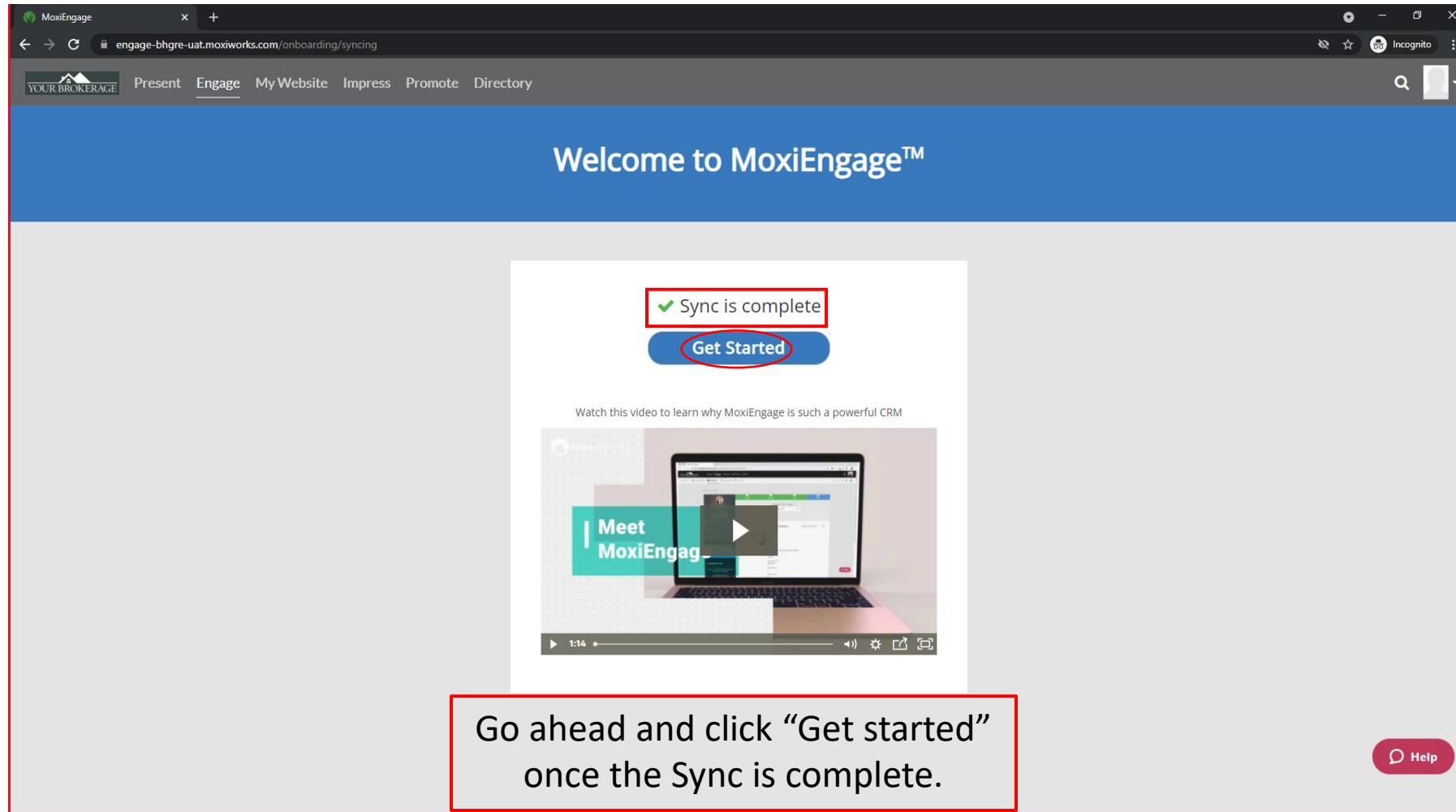


Welcome to MoxiEngage – Syncing in progress Screen

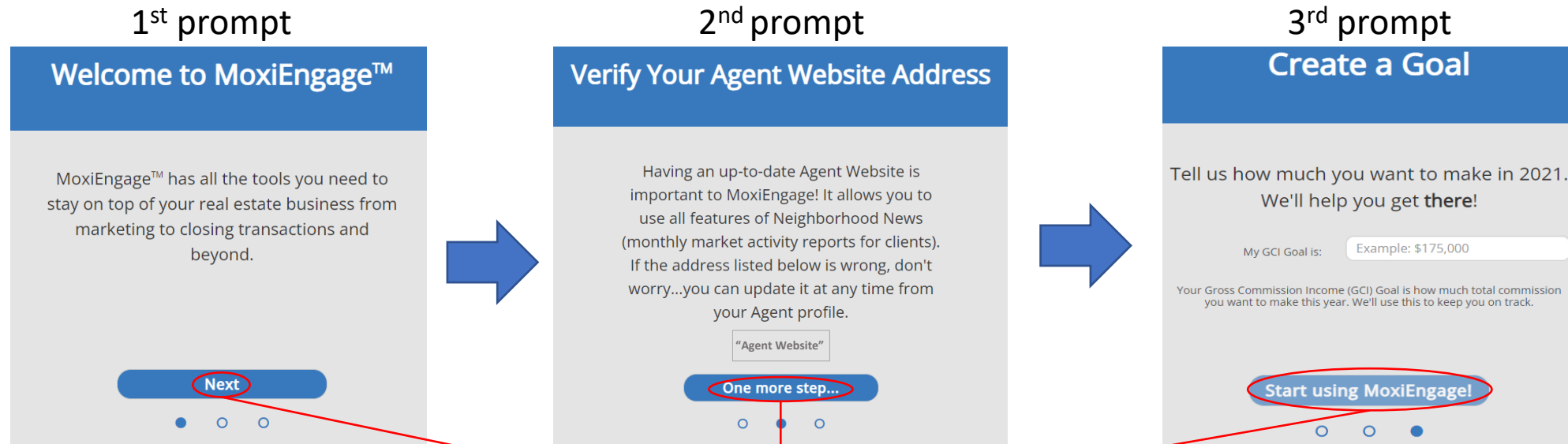


Feel free to watch the accompanying video for more information about MoxiEngage. If you want to do something else while you wait, you can since the syncing process will continue in the background uninterrupted.

Welcome to MoxiEngage – Syncing Complete Screen



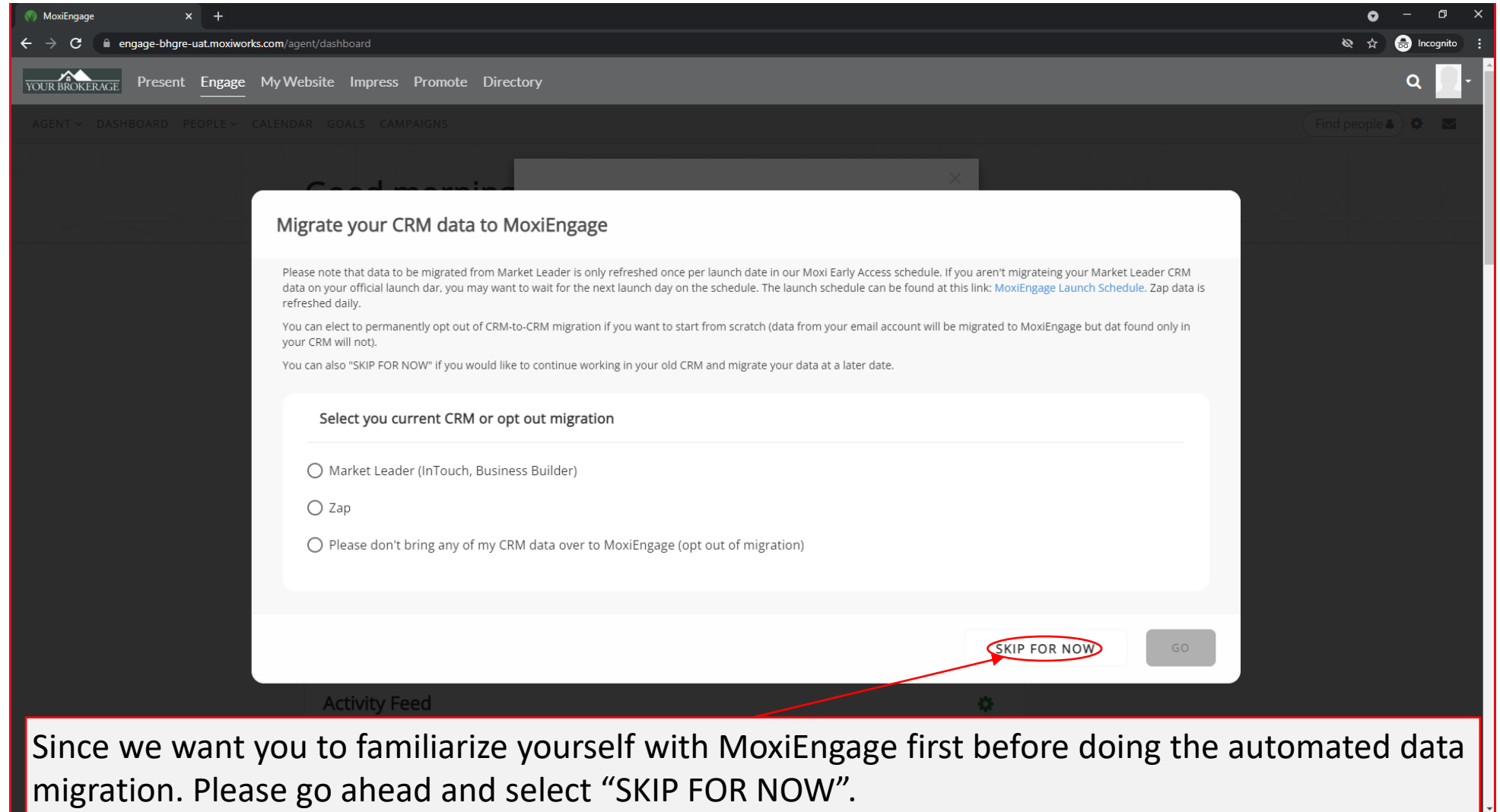
MoxiEngage- Once the Sync is complete follow the prompts:



After the email sync is complete, you will see the following prompts:

- On the 1st prompt read the message that is displayed and then Click "next".
- On the 2nd prompt read the message that is displayed and verify the website displayed and then Click "One more step...".
- On the 3rd prompt read the message that is displayed and enter your GCI goal and then click "Start using MoxiEngage".

If shown, Automated data migration prompt – Select “SKIP FOR NOW”.



The screenshot shows the MoxiEngage dashboard with a modal window titled "Migrate your CRM data to MoxiEngage". The modal contains the following text:

Please note that data to be migrated from Market Leader is only refreshed once per launch date in our Moxi Early Access schedule. If you aren't migrating your Market Leader CRM data on your official launch day, you may want to wait for the next launch day on the schedule. The launch schedule can be found at this link: [MoxiEngage Launch Schedule](#). Zap data is refreshed daily.

You can elect to permanently opt out of CRM-to-CRM migration if you want to start from scratch (data from your email account will be migrated to MoxiEngage but data found only in your CRM will not).

You can also "SKIP FOR NOW" if you would like to continue working in your old CRM and migrate your data at a later date.

Below the text is a section titled "Select your current CRM or opt out migration" with three radio button options:

- ☐ Market Leader (InTouch, Business Builder)
- ☐ Zap
- ☐ Please don't bring any of my CRM data over to MoxiEngage (opt out of migration)

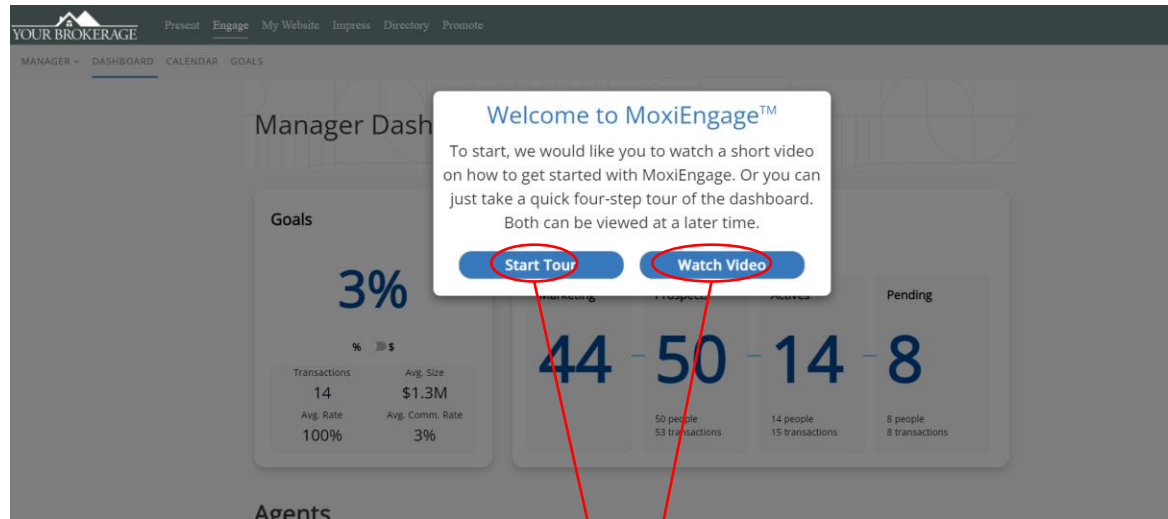
At the bottom right of the modal are two buttons: "SKIP FOR NOW" (highlighted with a red circle and a red arrow) and "GO".

Below the modal, the "Activity Feed" section is partially visible.

Since we want you to familiarize yourself with MoxiEngage first before doing the automated data migration. Please go ahead and select “SKIP FOR NOW”.

Do not worry, you will be able to select the automated data migration option afterward when you are ready.

Welcome to MoxiEngage : Start Tour or Watch Video



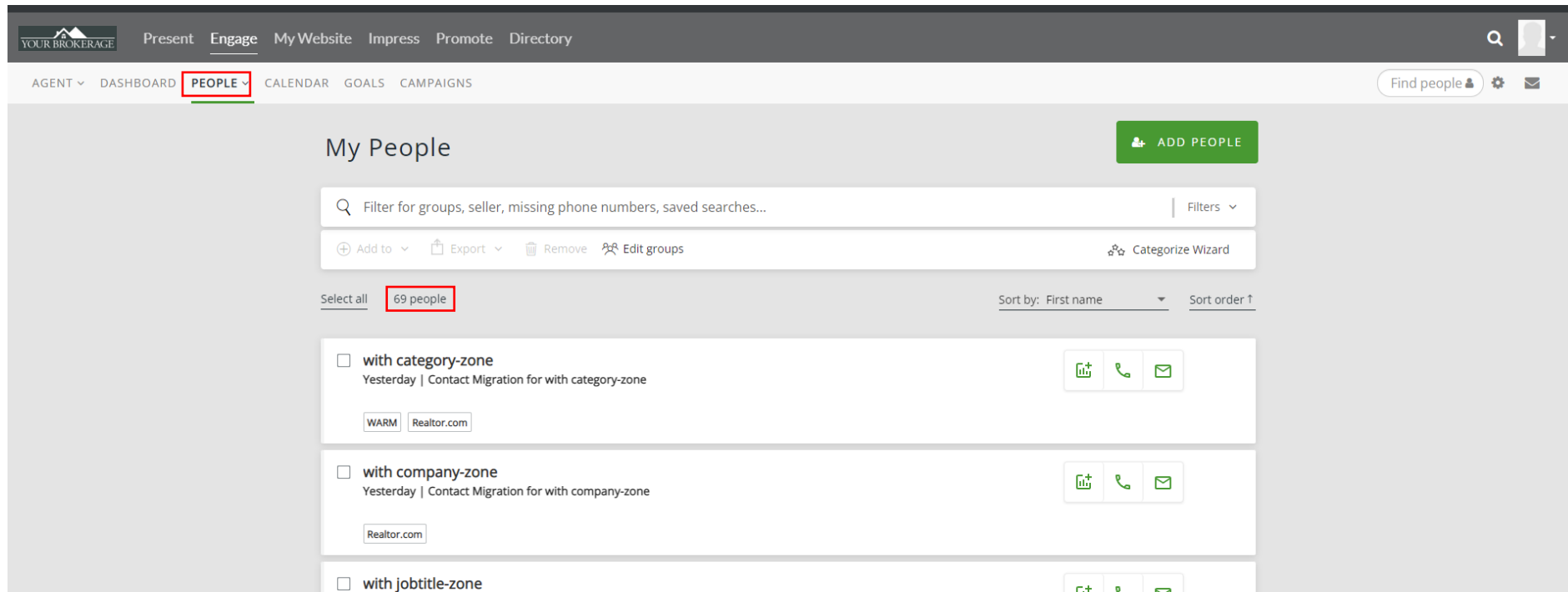
Go ahead and choose “Start Tour” and/or “Watch Video” to start familiarizing yourself with the interface and functions now. If you choose to skip, you can access the tour option later from settings menu (Gear Icon on the top right of the screen).

O365 email account - Sync process complete

- Now please go to the next page for a list of [things to do once the sync is complete](#), followed by support and educational links..

Things to do after completing your email sync:

- > After the email sync is completed, take note of the number of contacts that were created in Moxi Engage by going to the “PEOPLE” tab.
- > Verify the number of contacts in Engage closely matches the number of contacts in your email client's main "Contacts" folder.



Additional support links (learning provided by Moxi)

MoxiEngage Support :

- Understanding the basics of MoxiEngage:
 - Link: <https://support.moxiworks.com/hc/en-us/articles/205467585-Getting-Started-with-Moxi-Engage>

MoxiEngage Educational resource :

- There are tutorial video guides under courses for MoxiEngage. There are 2 courses, “Getting started with MoxiEngage” and Taking a “Deeper Look at MoxiEngage”.
 - Link: <https://education.moxiworks.com/bundles/moxiengage>