Anywhere[SM]

Getting Started with MoxiWorks: Top Things To Know

MOXIENGAGE

1. How do I add contacts to a running campaign?

- Adding contacts to a running campaign can be done quickly in MoxiWorks, so you can be sure to reach all your contacts and stay in flow with them.
  - Choose **running** from the Campaign screen on the left to see all currently active campaigns
  - From the running campaigns, choose the title of the one you want to add contacts **Note:** *Date-based campaigns, such as the Holiday Greetings, will only send upcoming emails to new clients you add. Sequential campaigns, such as Buyer Prospects, will send the first email in the sequence and continue based on the cadence set.*
  - Select **add people** on the left
  - When adding people, you have two options, you can select single contacts under the People tab, or you can add particular groups under the Groups tab
  - Once you have everyone added you wish to add, select Next
  - Review your added contacts and remove any using the X icon as needed
  - Once you have reviewed the contacts, select **save** to add them to your running campaign

Adding Contacts to a Running Campaign

2. How do I export contacts?

- You may need to export portions of your database for use in other programs or to create a mail merge document.
  - Select **people** from the top navigation menu and choose **my people** from the drop-down
    - This brings you to the My People screen
    - Select a contact or multiple contacts to activate the export function
    - You can choose as many groups or filters to get the exact selection of contacts you want to export. You can also clear all filters and Select all to export all contacts in your database. **Note:** *There is no limit set on the number of groups or filters you may select.*
    - When all desired contacts are chosen, select **export** to export contacts to an excel file in the format of:
      - Comma-Separated Values i.e. CSV file
      - Mailing Label Format
      - Custom Xpress

Exporting People from MoxiEngage

3. How do I import contacts into MoxiEngage (Outlook Mail Sync)?

- Follow the instructions below to import your contacts to your Moxi Sync Email so your contacts will sync to MoxiEngage. To import contacts to Microsoft Exchange, you will need to have all your contacts added to the Outlook CSV file template.
  - From your email inbox, choose the **people icon** in the bottom left
  - Select **manage** from the top right
  - Choose your Outlook Import Template from your computer by selecting **browse**
  - Once the file has been added, select **import**. **Note:** *Outlook may prompt you to verify the text looks correct. Verify you have the correct file and then select Looks OK, continue.*
  - Your import will begin automatically and notify you once the contacts have finished importing. Select **close** to dismiss the notification.
    Note: Data from MoxiEngage and Outlook will now be synchronized

Importing Contacts into Microsoft Exchange

4. How do I import contacts into MoxiEngage (Direct)?

- To import contacts to MoxiEngage, you must add your contacts to the Contact Import Template CSV file. The upload limit is 2,500 contacts.
  - Log in to MoxiEngage
  - Select **people** from the top navigation menu and choose **my people** from the drop-down
  - From the gear icon in the upper right corner, select **import Outlook CSV** from the dropdown
  - Choose Select File
  - Find the contact CSV file to which you added your contacts on your computer, then select **open** to begin the import process. Your file automatically starts importing. During this process, do not close your browser window
  - When the import has finished, you see a pop-up notifying you that the import finished
    Note: *Import time may vary depending on the size of the import file.*

Importing Contacts Directly into MoxiEngage

5. How do I import contacts into MoxiEngage? (Google Mail Sync)

- Whether moving from one email program or another or trying to get all your contacts in one place, importing contacts in bulk can save valuable time and energy
  - In Gmail, **start** from the Contacts screen and select **import** on the left menu bar
  - Click **select file** to locate your Google Mail CSV file
  - Once the file has been selected, select **import**
  - Your contacts will be added to your contacts folder and will automatically be available to use

  Note: Data from MoxiEngage and Google mail will now be synchronized.

Importing Contacts into Google Mail

6. How do I change my sync email?

- To change the sync email address, submit a support ticket to MoxiWorks Help Center. Once the update is complete, you must log in to MoxiEngage and start a new sync to reflect the change. **Note:** *MoxiEngage activity is associated with each specific sync email address. Changing your sync email address will result in the loss of historical data on MoxiEngage activity.*

7. How do I add a contact to a group?

- You can add a single person to more than one group to easily manage your sphere and communicate with them
  - From the client's contact card, select **add to group** on the bottom left toolbar
  - Select the group(s) in which you would like this person to be included by selecting the **plus icon**
  - Once you have chosen all desired groups, select **done**

Adding an Individual to Groups

8. How do I remove contacts from my account?

- Your people are connected with both your email and MoxiEngage; however, you may wish to remove some of them from MoxiEngage. Follow the steps below to learn how to hide people from your MoxiEngage account. **Note:** *Removing people from MoxiEngage will hide their associated transactions and deactivate all of their subscriptions but will not delete them from your email contacts. You can recover removed people from the Manage Removed menu: Select the gear at the top right corner of the screen, then choose **manage removed** (note that you must be on the My People page when accessing the icon for Manage Removed to appear). Select Restore next to each name you would like to add back to your Sales Flow. Select done when finished restoring people.*
  - Log in to MoxiEngage
  - Select the **checkbox** next to individual contact/s to activate the remove button
  - Select **remove** to hide these contacts from MoxiEngage
  - Select **contact category** and then **remove**

Removing People from MoxiEngage

9. How do I migrate contacts?

- The Automated Data Migration Tool provides an easy way to get your contacts from Market Leader or Zap Automated Data Migration tool into MoxiEngage. When you log in to MoxiEngage after onboarding, the Automated Data Migration tool will appear. To start your migration with the Migration Tool:
  - Note the number of contacts in Market Leader or Zap (you will use this number to check that all of your contacts migrated)
  - Select your previous CRM to migrate your data from
  - Click the **go button**
  - Confirm you selected to migrate data from the correct previous CRM

- Wait for the email notification or the notification in MoxiEngage to tell you the data migration is complete. Feel free to navigate away from MoxiEngage while the migration is in progress.
- Receive the email or in-app notification that your migration is complete!
- Check the number of contacts you have in MoxiEngage to ensure your contacts from your previous CRM migrated successfully. If the number of contacts is significantly different, contact the MoxiWorks Help Center.

10. How do I add saved searches?

- Creating saved searches for your clients in MoxiEngage is a great way to help them see all the listings they are interested in while allowing you to see all their favorite properties from those searches.
- From your My People page, choose the client you wish to set up a search for
  - On the left of their profile, choose **favs & saves**
  - If the client does not have a saved search already created, you will have the option to create a new one as needed by clicking **create search**
  - If the client already has searches added to their account, you will see a list of all existing searches and can create new searches by clicking **+ saved search**
  - Perform the desired search using the search options and filters. This search function will be the same as the Custom Neighborhood News Search.
  - Once you have added all your search parameters, select **email & settings** in the bottom right
  - Add a search title and confirm the email address and message as desired
  - Set the desired email frequency for the search and choose if you want an email to go out if no new listings exist
  - Once you have set up the email as desired, select **save and send**

Creating a New Saved Search for an Engage Client

11. How do I set up a new campaign?

- Creating a new email campaign is a great way to stay in contact with all your people
  - Select **campaigns** from the navigation bar in your MoxiEngage Dashboard
  - Click **add from library**
  - Choose a campaign using the Add to Campaigns button next to the campaign you want to use. **Note:** *Even if your brokerage allows agent edits to campaigns, some campaigns are un-editable (you will see Not editable next to these campaigns).*
  - Click **close** in the top right to close the campaign library
  - Open the Awaiting Setup section
  - Choose the campaign you want and click on the **title**
  - Click **setup**, then add recipients to add people to the campaign
  - Choose **people or groups** to send the campaign to by clicking the **box next to them**, then click **add** when you are done adding recipients
  - Click **save** to save your list of recipients
  - Use the **run campaign button** to start sending your new campaign

Set Up a New Campaign

12. How do I edit an existing campaign?

- You may want to customize the content of the campaign email to fit your client's needs more precisely. In these cases, you can create or edit an email and add it to your campaigns as needed.
  - Editing a campaign email
  - From the Campaign Dashboard, select **my emails** to view your email library
  - Select the **name of the email** you wish to update
  - If you do not see the email, you want to edit or haven't downloaded any yet, select **add from library** in the top right
  - From the library, you can preview emails using the preview button and download as many emails as you need by selecting **add to library**
  - Select as many emails as you want, then select **close** to return to the My Emails page to edit your newly downloaded emails
  - Once in the edit window, you will have several options to customize your email

13. Can I pause my campaign?

- You can pause the campaigns you have set up in MoxiEngage. This will pause the campaign so you can make any edits or changes you need without worrying about accidentally sending out new emails to your clients.
  - From your Campaigns Dashboard, find the campaign you would like to manage and select the **title**
  - To stop the campaign, and prevent any further emails from sending out, select **pause campaign or archive campaign**

14. How do I add another agent as an admin to my account?

- We are all busy people, and you may want other people to have access to your account to help with the workload. Whether those people be assistants or teammates, there may come a time when someone else may need to access parts of your Moxi Account.
  - From your roster, select **passwords & access**
  - Select **account access**
  - Select the **manage button** on the My Account Access Tab
  - Invite people to access your account by selecting **invite**

15. How do I add admin to my account?

- You can not add an agent as an administrator to your account; you can designate office staff to access your account.
  - Impersonation allows designated office administrators or office staff to log in to the Marketing Center account of agents within their office. Using Impersonation, the office administrator or staff can create, edit or distribute projects on behalf of agents without needing to know the agent's Marketing Center password.

What is Impersonation?

16. How do I email a saved search to more than one email address?

- This function is not available. Saved searches, like Neighborhood News, can only be sent to one email address.

17. Where do I get incoming leads?

- The MoxiEngage settings will allow you to manage your lead providers and edit your tasks and settings, allowing easy access to working with your leads.
  - To access your MoxiEngage Preferences, select the **gear icon** in the top right and choose **engage settings**
  - This will bring you to your MoxiEngage Preference page, where you can manage several settings, including automating tasks for incoming leads

Setting Your MoxiEngage Preferences

18. How do I create a custom signature?

- The My Brand – Signature allows you to customize your email signature for all emails sent from MoxiWorks. Depending on your brokerage settings, you will see different options for your signature.
  - To change your default signature, select an option from the **signature type drop-down menu**
  - Drop down menu options:
    - Basic: Provides the MoxiWorks default signature
    - Templates: Provide you with pre-defined options that are left, right, or center aligned
    - Custom (If Available): This allows you to create your own custom layout. Please note that all email platforms are different and may not display your signature as expected.

Setting Your MoxiEngage Preferences

19. How do I send bulk email?

- You can email your contacts and groups as needed from any screen in MoxiEngage
  - Select the **email icon** in the top right of your MoxiEngage sub-bar
  - From the pop-up, enter the name of your client or group and select **their name** from the drop-down to add them to the to field
  - If you would like to add an image to your email, select the Image icon to upload an image from your computer. **Note:** *Images have a 25MB file size limit.*
  - If you would like to attach a file to your email, select **attach file** at the bottom of the Email window. **Note:** *Attachments have a 10MB per file size limit and a maximum file size limit of 25MB total.*
  - Add your email message and select **send**

Emailing Contacts from MoxiEngage

20. **How do I create a custom email?**

- Email campaigns are a great way to send a custom email to your contacts using the bulk mailing features found in MoxiEngage Campaigns
  - Select the **emails tab** from the main Campaigns screen
  - Select the **email you want to edit**
  - If you do not see the email, you want to edit or haven't downloaded any yet, select **add from library** in the top right
  - From the library, you can preview emails using the preview button and download as many emails as you need by selecting **add to library**. Select as many emails as you would like, then select **close** to return to the My Emails page to edit your newly downloaded emails
  - Select the **email you want to edit**
  - After you select the email, you will have several options to edit

Sending an E-Blast Campaign Using Your Own Edited Email

21. **How do I unsubscribe a contact from Neighborhood News?**

- Follow the steps below to unsubscribe an individual from Neighborhood News
  - Select the **person** you would like to unsubscribe from Neighborhood News
  - Select **Neighborhood News** from the person's profile page
  - Select **details**
  - Select the **more option** next to the subscription you wish to remove
  - Select **remove**
  - Select **continue**

Subscriptions: Unsubscribing an Individual from Neighborhood News

MOXIIMPRESS

1. **How do I export contacts?**

- To export your contacts from MoxiImpress:
  - Navigate to the Contacts tab
  - Click the **actions dropdown menu** and find Export All Contacts
  - Your contacts will download in an Excel file

How to Export my Contacts from Impress?

MOXIPRESENT

1. **How do I find my missing CMAs?**

- MoxiPresent always auto-saves when you switch between tabs

How do I save my presentation/CMA?

2. **How do I edit pages in my presentations?**

- Custom pages give you the flexibility to present any type of content you want to your clients on your presentation pages. To create a custom page, follow these instructions:
  - To create a custom page, go to the Pages Screen
  - Select the a**dd page button** and choose to **create new**
  - From the pop-up, choose **build page**

[Create a Custom Page]

3. How do I create a custom page?

- Custom pages can be used to display information about the community you serve, present market statistics, or simply give your client a taste of your style
  - To create a custom page, go to the Pages Screen
  - Select the **add page button** and choose **create new**
  - From the pop-up, choose **build page**

[Create a Custom Page in MoxiPresent]

MOXIWORKS SUITE

1. **How do I set up my Moxi account?**

- The first thing you want to do with your new account is to check or enter your Profile information. Access the Profile information after logging in by clicking on **your name** in the upper-right of any page, then selecting **profile**. **Note:** *Profile and/or MLS information for agents of Anywhere brands cannot be updated within the MoxiWorks products, as this information is supplied to us through an external brokerage or franchise data feed. To update your Profile and/or MLS information, it is recommended that you check with your office admin or contact Anywhere at support@anywhere.re for assistance. Once the Profile and/or MLS information is updated in the external brokerage or franchise data feed, it will sync to your Moxi account within 24 hours.*

[Where do I start?]

2. **How do I change my profile photo in Moxi?**

- To add or change your agent photo:
  - Click **your name** in the upper-right of the page
  - Click on **profile** in the dropdown menu
  - On the right side of the page, under photo select **click to upload** (some browsers allow dragging your image onto click to upload the image. **Note:** *If you are replacing an existing photo, first hover your mouse cursor over the existing Photo and click the trashcan icon to remove the existing image. The click to upload link will then become visible.*
  - Navigate to the agent photo you want to upload
  - Click the **save** button to finish

[How do I add or change my agent photo?]

3. **How do I create a custom page?**

- Custom pages can be used to display information about the community you serve, present market statistics, or simply give your client a taste of your style
  - To create a custom page, go to the Pages Screen
  - Select the **add page button** and choose **create new**
  - From the pop-up, choose **build page**

Create a Custom Page in MoxiPresent

4. **How do I change the office I am associated with?**

- To update your office information:
  - Click **your name** in the upper-right of the page
  - Click on **business info** in the dropdown menu
  - Edit the office contact information
  - Click the **save** button when done

How do I add or change my office contact information?

MOXIWEBSITES

1. **How do I edit my website URL?**

- To set your custom domain as your Primary display address:
  - Navigate to the MoxiWorks Website Admin
  - Click on **settings**
  - Choose **personal domain**s from the drop-down menu as shown in the first step above
  - Find your custom domain name located under the Active Domains on this site list at the top of the page
  - Select the bubble to the right of the domain name, then select the **set primary domain** button. **Note:** *If your domain is not yet ready to be set as primary, it will be grayed out, and you can not yet select the bubble to the right. A timestamp of when verification began will display next to the line. Verification can take up to 24-36 hours. Please contact our support team at MoxiWorks Help Center for assistance if the timestamp indicates it has been longer than this.*

Connecting Your Custom Domain

2. **How do I connect a custom URL?**

- With your agent website, you can choose to have a number of custom domains pointing to your site.
  - To manage your domains, navigate to Settings and choose **personal domains** from the drop-down
  - Add the domain name you are adding to your MoxiWorks website into the box provided and select **submit**. Do not include "www" in front of your domain name.
- You will need to change some information about your domain name with your domain host (your domain host may be GoDaddy, Google Domains, Network Solutions, etc):

    - Change your Website's A-Record to the IP address provided on the settings screen (see image below). You can only have one A-Record. If there is an existing A-Record, you need to delete it before you can add the new one to avoid verification issues (if the old A-Record cannot be deleted, remove forwarding on the registrar first).
    - Change the www CNAME value to the one provided on the settings screen (see image below). Only one www CNAME record should exist, so remember to edit the existing one instead of adding a new one.
- Most domain hosts or registrars will have instructions on their support sites to show you how to make these changes
- After completing the changes to your A record and www CNAME, select the **initiate domain verification** button. **Note:** *Once your domain has been verified, you will receive an email with confirmation that your domain is ready.*
- Once your domain has been verified, you will receive an email with confirmation that your domain is ready

[Connecting Your Custom Domain]

3. Why isn't my custom domain working?

- If your domain is not yet ready to be set as primary, it will be grayed out, and you can not yet select the bubble to the right. A timestamp of when verification began will display next to the line. Verification can take up to 24-36 hours. If the timestamp indicates it has been longer than this, please contact the Moxi support team at MoxiWorks Help Center for assistance.

4. How do I change where people appear on the Brokerage Website Directory page?

- The Office Directory Display Category field determines which tab someone is found under in the Brokerage Website Directory. The field can be updated in roster for most people. However, if your information comes from a feed, you need to change the field in the feed.

[Working with Website Directory Pages]

5. How do I access the Website Admin tool for my brokerage website?

- The Admin Tool is your control panel where every aspect of your agent website can be configured
    - Navigate to your Agent Website Admin Tool by selecting the **image** in the top right and choosing **website** from the drop-down. Then choose **access your website admin.**

[Navigating the Admin Tool]

6. How do I set up my website?

- Moxi makes it easy for you to create a website to hit the ground running
    - Select **websites** from the agent drop-down menu
    - Select **create a new website**
    - Choose **personal domains** from the drop-down menu, as shown in the first step above
    - In the new window, select the type of website you want to create for your account from the drop-down in Step 1

    - Enter your desired domain name
    - Select **check to verify the domain can be used**, then choose **submit** to create your site. **Note:** *If the domain is not available, you will need to repeat steps 4 and 5 until you have an available domain*
    - Once your site is created, you will be taken directly to the Website Admin Tool

[Creating Your Agent Website]

7. **How do I set up my social media links?**

- Help your site visitors connect with you across all of your channels by adding social media links to your Agent Website homepage
    - From your Roster, select the **web info tab**
    - Enter the URLs for any and all of your social media accounts
    - You have now added your social media to your website, and the social media links will appear on the Home and My Bio pages
    - Select **save**

[Adding Social Media to Your Website]

8. **How do I add members to my team website?**

- If you are part of a broker or agent team, and you would like your team members represented on your Website, you may add them on the My Team screen.
    - Select **my team** from the left-hand navigation on your Agent Website Admin Home
    - Search for your team members by entering their first and last name and selecting find
    - Select **add as team member** next to the name of the person you would like to add
    - Include any social media links for your team members and select **update**

[Teams: Adding Team Members to your Agent Website]

9. **How do I add widgets to my website?**

- This article goes over a few different ways to add third-party extensions or code to your Website. This could be a YouTube video, a customized button, or more extensive code.
- Log into your Agent Website Admin Center
- Navigate to Site Pages and click **edit** under the page you'd like to add your code to
- Launch Page Builder
- Locate the HTML module, and drag and drop it on the page where you want it
- Paste your custom code in the small window that pops up
- Click **save**, and make sure to publish your changes

[Websites: Adding Widgets, Plugins, or External Code]

10. **How do I add reviews and testimonials to my website?**

- Agent Websites are intended to demonstrate your expertise in your field and past successes. By including client testimonials on your agent website, you'll establish credibility and trust with future prospective clients who are considering you for their next home sale.
- Go to your Website Admin

- Navigate to Site Pages, then select **add new** and choose Testimonial Page. Select **submit** to create the page.
- Next, give your Testimonial Page a title and publish once you're done
- On this page, you can type in a headline and your client's testimonial in the context field and include a photo if you desire. Be sure to check the box indicating you have permission to post your client's review here. Select **add**, then publish when you are done.
- Now, you will have a new testimonial page on your Site Pages where you will collect all your client's reviews of your business

How to Manually Add a Testimonial to your Agent Website