

MoxiEngage Email Sync Overview

EMAIL REQUIREMENTS FOR MOXIENGAGE

The Engage sync is the primary way that MoxiWorks pulls in contacts, contact data and calendar information and synchronizes an agent's contacts directly to their CRM.

This sync is done via email and there are several types of emails that can be used:

- Google (Google Workspace or Consumer Gmail)
- Microsoft (OnPrem Exchange 2016 or above or O365 Online)

A brokerage may provide a combination of 1 enterprise email type and consumer Gmail if they choose to do so.

Only 1 enterprise email can be synced to at a time for an individual brokerage.

To use the the Engage application a "Moxi sync email" is required. To sync Engage with your email address, it must be an actual mailbox and not an alias or forwarding email address.

COMPLETING THE MOXI INTEGRATION FORM

To assist with this sync configuration, as part of the initial communications for Early Access, brokers will be asked to complete a Moxi Integration form. One of the questions on that form requests to identify what a broker's email configuration is (primary email platform used and if they would like to make free Gmail available). Based on that selection, MoxiWorks will create a provisioning flow for their agents.

HOW THE ENGAGE SYNC WORKS

- MoxiEngage will pull contacts within the main contact folder of your email. Any contacts not in this folder will not sync.
- The contacts folder will share it's contact data, calendar information and inbox for use with Engage.
- Contacts sync'd to Engage are available to Impress and Partners via the Moxicloud API for use in other applications.

For brokerages that are not allowing the use of consumer Gmail the Engage application will use the Primary email (Business email in Dash) to attempt to establish sync by checking that the email domain matches the domain(s) provided by the brokerage. In the case where the email domain matches it will be used to populate the "Moxi sync email" field in the user profile and establish impersonation. In the case the domain does not match a sync will not be established.

For brokerages that opt to allow free Gmail for their users those users on clicking Engage for the first time will be offered the ability to select their business email (company provided email) and if the domain matches the impersonation record they can choose to use it or authenticate into a consumer Gmail account to establish a sync. Once the sync is completed the user will be sent an email notification letting them know the CRM is ready for use.

Moxi Email Sync Q&A

1. What if I manage multiple email domains?

If a Brokerage manages multiple email domains impersonation can be set for more than one domain if they are managed under the same Tennant or Admin. For example a company maintaining abc.com and 123.com as email domains in the same O365 instance can have impersonation set for both domains.

2. What if I have contacts in my email but I don't see my contacts in Engage?

If you have contacts that are in your email, but you don't see them in Engage, check to make sure you have your contacts in the correct folder. The main contact folder in an email is usually called Your Contacts or Contacts and is the default folder on your account.

3. What if I want to modify my Moxi Sync email?

If a user needs to modify their Moxi Sync email they will be required to contact either a user with Company Manager permissions or Moxiworks support to remove and re-establish the CRM provisioning. If a user opts to have their CRM provisioning removed and reset they will lose any system activity records associated with their contacts in the CRM, however the contact records themselves will continue to exist in the email that was used for the sync as well as any groups or categories created by the user.

4. How do I limit the contacts that MoxiEngage pulls from my email? (i.e. you have contacts in your sync email that you do not wish to sync over to MoxiEngage)

MoxiEngage is designed to only pull contacts from the main contact folder of your email. Any other folders in your email will not be pulled to Engage's My People screen. If you have contacts, you do not want to see in Engage, but don't want to delete them from your email, you can move those contacts to a new folder so Engage won't pull them over.

5. Can I delete contacts from Engage?

Removing people from Engage will hide their associated transactions and deactivate all their subscriptions but will not delete them from your email contacts. You can recover removed people from the Managed Removed menu.

6. Is Moxi Email Sync/MoxiEngage secure?

MoxiWorks takes safety and security seriously. To ensure MoxiWorks maintains industry security standards, MoxiWorks has undergone penetration testing and a SOC 2 Type II audit. Additionally, firewall and software updates are maintained to ensure the integrity of their network, software, and devices. Data at rest is encrypted to add an additional layer of protection.

For additional information on Engage and Contacts, please visit [Moxi Support here](#).