Getting Started with MoxiWebsites

ESSENTIAL TASKS	You'll find getting started steps below, but for more detailed information, check out the MoxiWorks Help Center for MoxiWebsites.

PERSONALIZE YOUR WEBSITE	1. Once logged in, Go to **Personalize your Site's Style** to select a layout: Search-Focused or Agent-Focused. 2. Next go to **Personalize Your Homepage** to customize your site further. For more information, review the Personalizing Your Sites Style article.

MAKE YOUR SITE PUBLIC	1. Select **Privacy Settings** from the **Settings** menu in the left navigation. Uncheck the box **Discourage search engines from indexing this site.** 2. Select **Save Changes** as the final step to make your website public! For more information, review the Make Your Site Public article.

SSL	1. From the website Admin home page, in the left navigation choose **Settings** and then select **SSL**. 2. Select the **Request SSL Certificate** button. 3. After two days, return to **SSL** and select **Go Ahead, Activate SSL**. For more information, review the How to Secure Your Website (SSL) article.

RECOMMENDED ARTICLES	• MoxiWebsites Help Videos • MoxiWebsites Tutorials • Connecting Your Vanity Domain • Adding a Featured Video to your Homepage

LEARN MORE	For more tutorials check out the Moxi Help Center

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 **21Online** • Click the menu in the upper right corner • Scroll down and click Productivity Hub • Scroll down to find tiles for each of the MoxiWorks products
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. Get Started First Time MoxiEngage Guide
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

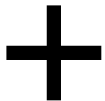| Sales Flow	
	Each Sales Flow zone is a milestone for an individual client's progress towards a successful transaction. These milestones each have tasks for you to customize and complete to help you stay on top of the transaction. As you continue to complete tasks, move your client's transaction through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

BONUS	

★★★	Review your Email Signature
	    o In the top right corner, click the drop-down menu next to your profile photo
	    o Select My Account
	    o On the left-side in the navigation pane, click My Brand
	
	Review your Signature
	
	Create your Agent MoxiWebsite
	
	Create your website

MoxiPresent
Quick Start Guide for Agents

The following Quick Start Guide gives Agents a quick way to dive right in and get started, using helpful MoxiWorks content.

Overview	
	So, what is MoxiPresent? A good question…and what better way to learn more than to <u>click here to see a brief (2 minute, 43 second) video</u> that will give you an excellent igdea of what MoxiPresent does.

How to Access	
	Now that you know (and knowing is half the battle), how do you access MoxiPresent? First, open **21Online**, then click the **menu** in the upper right corner. Scroll down and click **Productivity Hub**, and then scroll down to find tiles for each of the **MoxiWorks** products.

Creating a New Presentation	
	You're in! So, what can you do in here? You've seen the overviews – now, let's see what kinds of presentations MoxiPresent allows you to create: • If your client has a home to sell, the **Seller Presentation** is an excellent place to start. This will help determine a good price for their home and how it compares to the surrounding community. It can also suggest what changes should be made. Basically, everything that needs to be taken care of so your seller can get it sold and move on! • There's also a **Property Review** presentation, where you can create a personalized review of a property and compare it to current listings and market trends. • Then, there is the **Buyer Presentation**. This is how you can not only present homes within the price, size, room, and other ranges your client requests, but also is your way of telling your client who you are and how you do business via impactful branding. • Next, we have the **Buyer Tour Presentation**, which is useful in that, once you have a client on board, this can be used to help narrow things down when you're ready to go out and see the properties they're interested in checking out. It's also interactive and viewable via phone, which helps with immediate feedback and any potential questions or concerns. • And finally, the **Non-Listing Presentation** is basically PowerPoint on steroids. You can pull listing information from MLS to do a marketing piece, can create a guide to a particular home, or create a presentation for your fellow agents in your office! You can <u>click here to view a video</u> and view a step-by-step guide on how to create any of the above presentations; you can also <u>click here</u> to access a PDF listing these steps.

Presentation Output	
	Great! So, what does this all look like? The steps to build a new presentation are quite simple, but you might like to see what all these steps result in once you've built them out. Let's look at the potential here - <u>please click this link</u> to view a video.

Help	
	Anything else that might help? Of course! You might want to <u>click here</u> to view an article on navigating the MoxiPresent home page. Besides this, there are a variety of help articles that can assist you in your MoxiPresent endeavors. For an overview, <u>please click this link</u>.

MoxiImpress
Getting Started Guide

Overview	MoxiImpress is a marketing tool built to enable you to increase your productivity by easily marketing your listings and business, reaching more people, building stronger relationships with your prospects and clients, and driving more business. You'll find getting starting steps below, but for more detailed information, check out the MoxiWorks Help Center for MoxiImpress.

Accessing MoxiImpress	1. Open **21Online**. 2. Click menu in the upper right corner. 3. Scroll down and click **Productivity Hub.** 4. Scroll down to find the **MoxiImpress** tile.

Validating Your Information	Your profile information will show on any marketing materials you create in MoxiImpress, so it's important that you make sure it's all up-to-date. Contact your Office Manager to add/edit or update any of the information.

Editing Existing Projects	Scheduled an open house? Dropped the price? These unique events will trigger additional targeted marketing materials to be created automatically. You can also manually edit and update any existing material piece. MoxiImpress makes it easy to switch photos or edit the body text for any project. Simply click on any existing project and select the Edit button to make changes. Watch this video on editing a project, or follow these step-by-step instructions to update an existing project.

New Listings	MoxiImpress was designed to help you deliver beautiful marketing pieces for your listings. When your new listing goes live, branded materials are automatically created and sent. With MoxiImpress you can: 1. Create a new project (for example, for one off use). 2. Select a template from the design gallery. 3. Review and share.

Distribute Your Marketing Materials	The fun part about creating beautiful marketing materials is showing them off to the world. Within MoxiImpress you will have <u>options available</u> when ready to share and promote a listing. You can: • Publish to your MoxiWebsite. • <u>Email to your contacts in MoxiEngage</u>. • Download locally. • <u>Print</u> through your printer partner(s). • Share to Facebook, Twitter, or Pinterest.

Impersonation	MoxiImpress currently allows certain non-sales roles within your local office (such as Broker/Owner/Office Admin) access to your account via an Impersonation function. This gives brokers/office admins access to create, edit and share projects in your portfolios. To opt out: 1. Log in to your MoxiImpress account. 2. Click your name in the upper-right corner of the page. 3. Select **Account Settings** in the drop-down menu. 4. Click the **drop-down arrow** for the **Allow Office Administrator to Access Account** field. 5. Select **No** from the list. 6. Click **Save**.

Learn More	Check out the **Learning Library** on <u>Century 21 University</u> for more learning resources on MoxiImpress.