

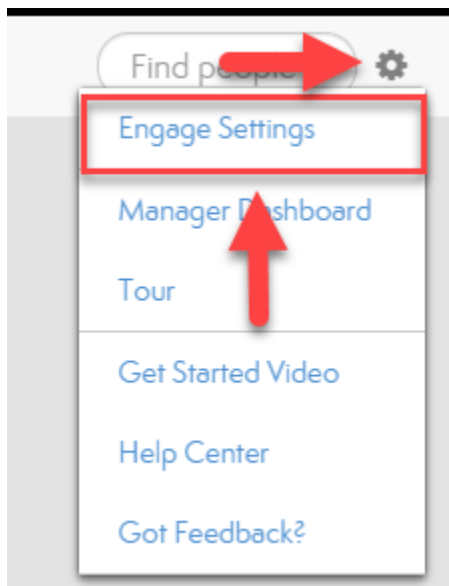
Setting Your Special Date Preferences

Keep your sphere in flow and in constant contact by using special dates like Birthdays, Anniversaries, and House-iversaries as regular touchpoints.

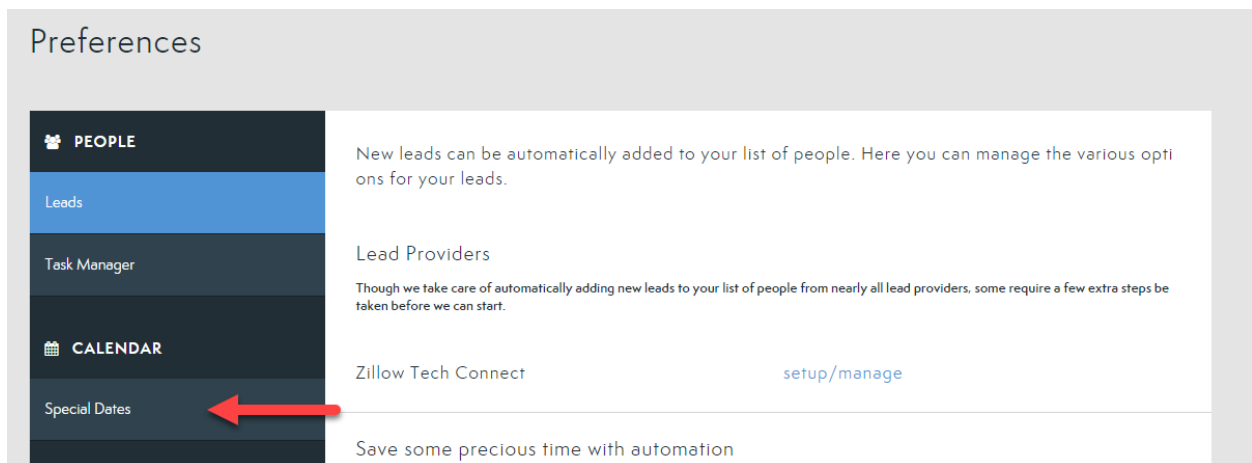
The Moxi Engage Preferences screen allows you to set the default email message, calendar reminders, and an option to add new contacts automatically to your calendar for each of the three types of Special Dates.

Setting Your Special Date Preferences

1. Select **Engage Settings** from the **Gear Icon** drop-down menu at the top right.



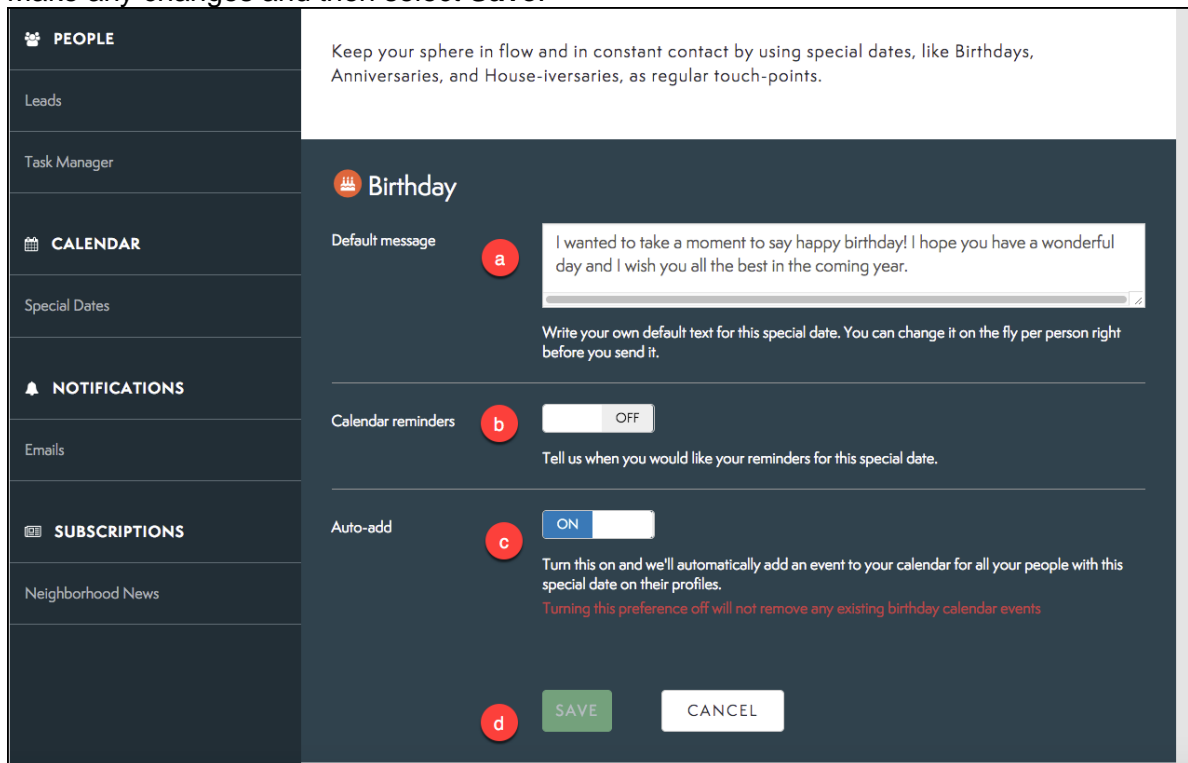
2. Select **Special Dates** on the left.



3. Select the Special Date you would like to update and click **Edit**.
 - a. Birthday
 - b. Anniversary
 - c. House-iversary



4. Make any changes and then select **Save**.



Keep your sphere in flow and in constant contact by using special dates, like Birthdays, Anniversaries, and House-iversaries, as regular touch-points.

Birthday

Default message a

I wanted to take a moment to say happy birthday! I hope you have a wonderful day and I wish you all the best in the coming year.

Write your own default text for this special date. You can change it on the fly per person right before you send it.

Calendar reminders b OFF

Tell us when you would like your reminders for this special date.

Auto-add c ON

Turn this on and we'll automatically add an event to your calendar for all your people with this special date on their profiles.
Turning this preference off will not remove any existing birthday calendar events

d

- a. **Default message:** Set the default message that will be used for special date emails.
- b. **Calendar reminders:** Turn this on to automatically include a reminder for dates added to your calendar. You will be able to select a reminder time-frame of 1-5 days, 1 week, or 2 weeks.
- c. **Auto-add:** With this option turned on, all current and new special dates will be added to your calendar.
- d. When finished, click **Save**.