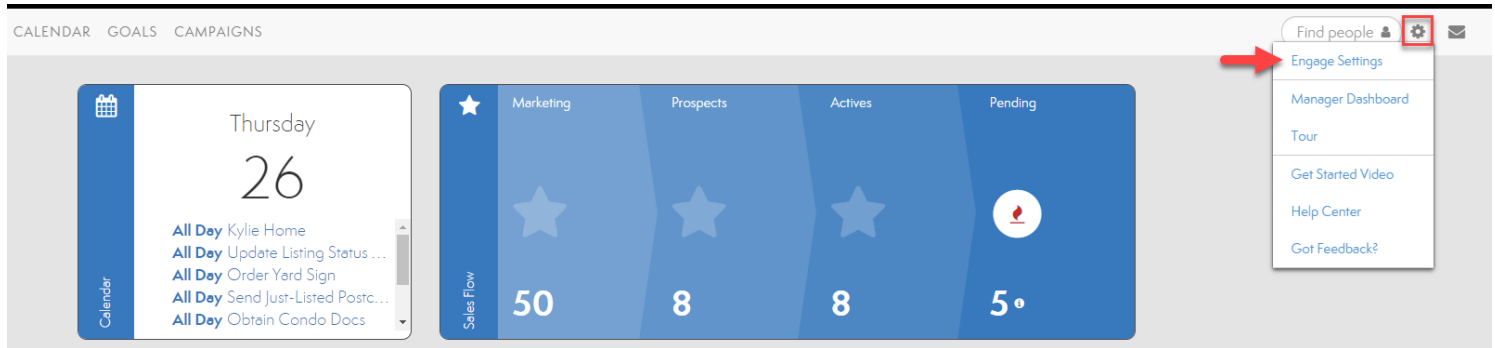


# Setting Your MoxiEngage Preferences

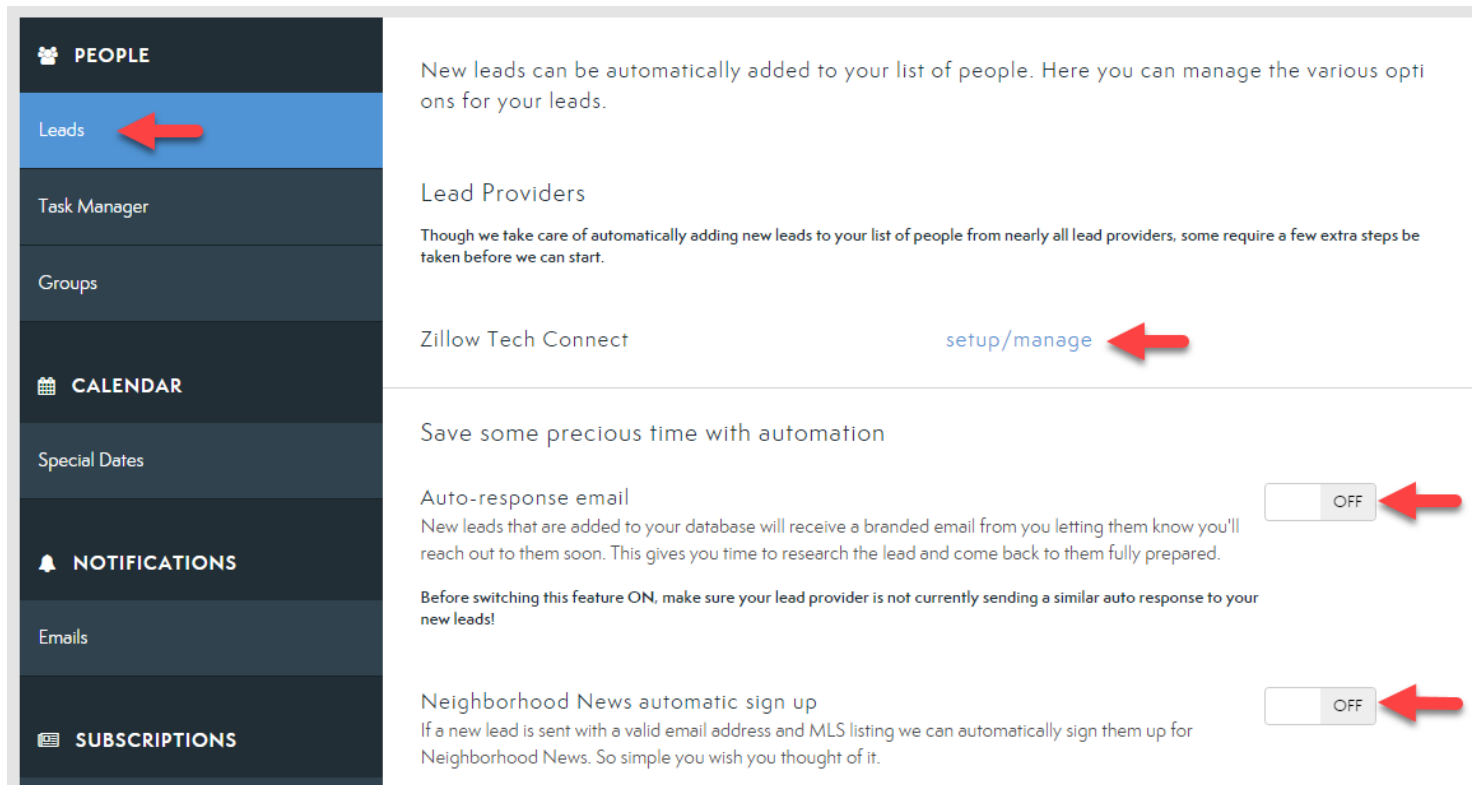
Changing your preferences can help you to make Engage work for you. The Engage settings will allow you to manage your leads providers, edit your transaction tasks and much more. Check out all the settings you have in MoxiEngage below.

## Setting Your MoxiEngage Preferences

1. To access your Engage Preferences, select the **Gear icon** in the top right and choose **Engage Settings**.



2. This will bring you to your **Engage Preference** page where you can manage several settings.
  - a. **Leads**: manage your lead providers and automations.



- b. **Task Manager:** manage your transaction tasks here. Create and remove tasks as needed so your Sales Flow works for you.

Use the Task Manager to imprint your own personal style on the Marketing and Sales Plans. Your custom changes apply to all newly added people and transactions.

| Plan Name            | Tasks  | Action    |
|----------------------|--|-----------|
| Marketing Plans      | 14 tasks to be completed within 75 days of start date  | customize |
| Leads Marketing Plan | 14 tasks to be completed within 75 days of start date  | customize |
| Marketing Plan       | 12 tasks to be completed within 75 days of start date  | customize |
| Sales Plans          | 49 tasks to be completed within 113 days of start date | customize |
| Buyer Plan           | 49 tasks to be completed within 113 days of start date | customize |
| Seller Plan          | 77 tasks to be completed within 117 days of start date | customize |

- c. **Groups:** verify missing groups from your email.

If you imported a file of contacts to your email, complete a final step: verify your groups here and save them to MoxiEngage.

Verify Groups

- d. **Special Dates:** manage your special data preferences for Birthdays, Anniversaries and House-iversaries.

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: 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.

Calendar reminders: Off

Auto-add: Off

### Anniversary

Default message: I see that today is your anniversary, so I wanted to take a moment to congratulate you on this very special day, and wish you much happiness in the years to come.

Calendar reminders: Off

Auto-add: Off

### House-iversary

Default message: Wishing you a happy anniversary on the purchase of your home. Here's to many more years of happy memories!

Calendar reminders: Off

Auto-add: Off

e. **Emails:** Manage your unsubscribed email notification.

CALENDAR

Special Dates

NOTIFICATIONS

Emails

Keep track of everything going on with your people through email notifications.

Email Notifications

Neighborhood News unsubscribes

OFF

f. **Neighborhood News:** manage your subscription settings, change the default email and generate Sign-up Widget and Links.

PEOPLE

Leads

Task Manager

Groups

CALENDAR

Special Dates

NOTIFICATIONS

Emails

SUBSCRIPTIONS

Neighborhood News

Keep your contacts connected with Neighborhood News, a monthly digest of activity within their area

Email message

Default message

Hello recipient's name!

Welcome to your personalized Neighborhood News report! Every month Neighborhood News provides exclusive access to real estate data and local market trends within a ZIP code. You can see more detailed information for this specific ZIP code by clicking through to the LINK\_TO\_FULL\_REPORT. When viewing your unique report, feel free to browse other ZIP codes for information about other areas too. You can always change the default ZIP code to an area that better suits your needs. See what's happening in your neighborhood. Please feel free to contact me with any questions!

Sophia

edit

Sign up link

Create a custom link so users sign up for Neighborhood News from your website, a presentation, an email, or anywhere else you can dream up.

Create Link

Neighborhood News Sign-up Widget

Add this widget to any site to allow visitors to subscribe and receive Neighborhood News, all while capturing and creating a new lead contact in Engage!

Generate Widget