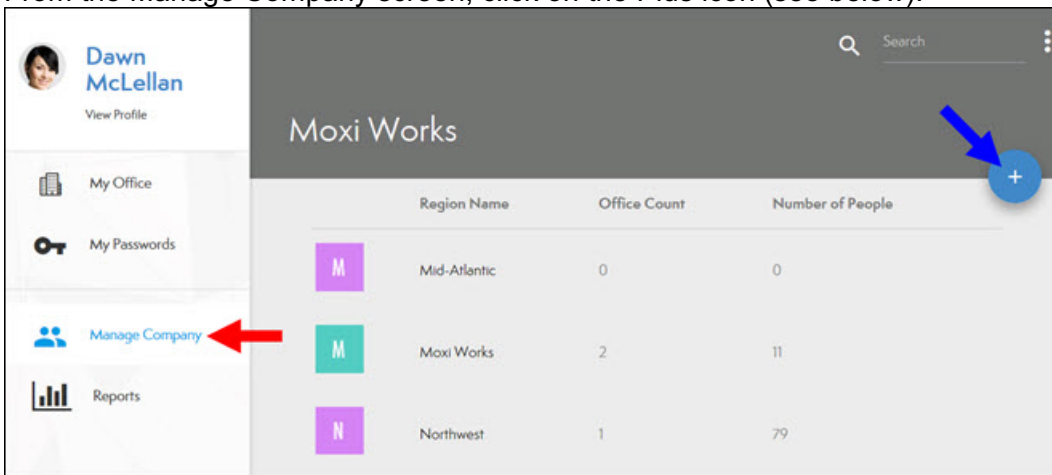


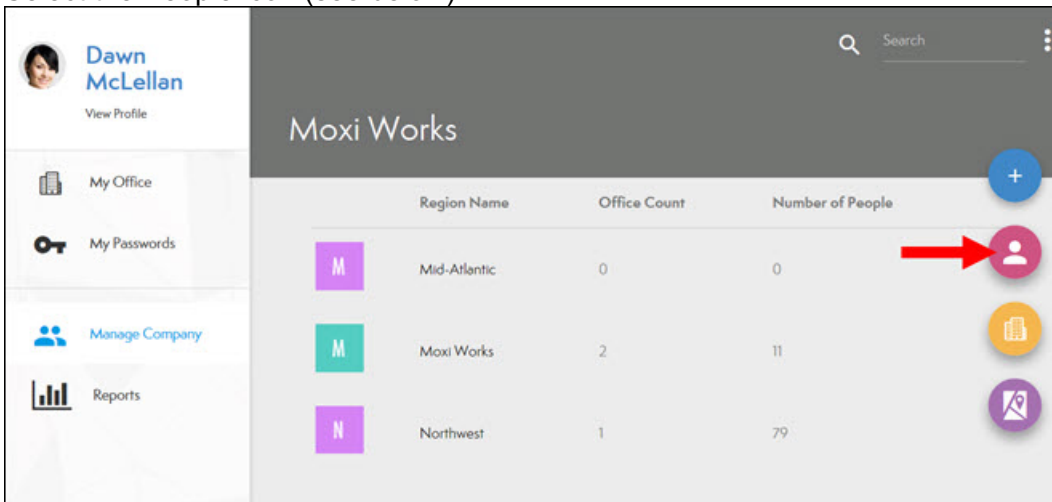
Roster – Adding a New Person

Add new agents or brokerage employees, manage their roles, and determine which products they can access.

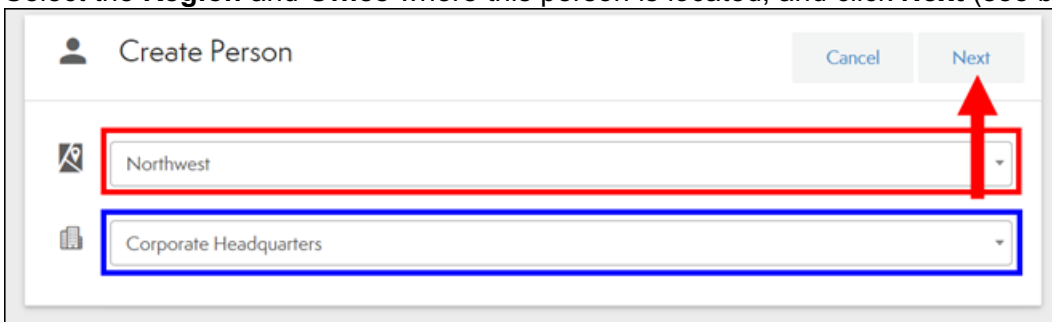
1. From the Manage Company screen, click on the Plus icon (see below).



2. Select the People icon (see below)



3. Select the **Region** and **Office** where this person is located, and click **Next** (see below).



4. Page one - Main Info:

Create Person

Cancel Next

1 main info 2 assign products 3 set emails

User is an MLS Member

a an MLS

mls id

b Profile Visible Online
Show in Internal Directory
Include in Reports

c first name

last name

d username

e User sets password
The system will send a new account email to the user that enables them to set their account password, post account creation completion

- a. Choose the MLS from the drop-down menu and enter the agent's MLS ID.
- b. Select if this person is ready to be visible online and in the Directory.
- c. Include the agent's first and last name.
- d. Create a username.
- e. Create a password.
 - i. If the toggle switch is green, the system will send the agent an email to set their own password, once the account has been created (See above).
 - ii. If the toggle switch is red, the admin will enter the new agent's password. (See below)
- f. Click Next.

5. Page two - Assign Products:

Product	Selected
Moxi Engage	<input checked="" type="checkbox"/>
Moxi Present	<input checked="" type="checkbox"/>
Agent Websites	<input checked="" type="checkbox"/>
Hub	<input checked="" type="checkbox"/>

- Select all the products this person should be able to access.
- Click Next

6. Page three – Set Emails:

a Primary Email
Primary email is publicly displayed across all products.

b Backup Email
Used to set up products, emails, and reset passwords.

c Moxi Engage Sync Email
Email used to sync calendar, contacts, etc to Moxi Engage.

- The Primary email is publicly displayed
- Backup Email must be different from the Primary.
- The Moxi Engage Sync Email can be the same as your Primary.
- Click Create