

MoxiEngage Integration Process using Google Workspace

Introduction

Don't panic! This setup has been completed by hundreds of individuals with no previous experience in setting up email accounts and/or credentials. This document includes screenshots of each step as well as links to the [training video](#) that goes through the entire process. You got this!

Use the links below to jump to a particular MoxiEngage integration set-up step:

- [Create Google Service Account Credentials with the "Owner" Role](#)
- [Create a Key for the MoxiEngage Service Account in JSON Format](#)
- [Enable Gmail API](#)
- [Enable Calendar API](#)
- [Enable People API](#)
- [Authorize the MoxiEngage Service Account as an API Client](#)

If you have questions or concerns, please check out our [Tips and Further Info!](#)

Overview

MoxiEngage integrates directly with your brokerage's Google Workspace (formerly G Suite) account to provide your agents and support staff with consistent and convenient access to their information, while eliminating any need to enter the same information multiple times.

MoxiEngage uses a service account as an API client to synchronize data and perform actions on behalf of individual users. Each MoxiEngage user account has an email address that corresponds to a mailbox on your Google Workspace account. All integration actions are performed within the context of a single given mailbox. MoxiEngage never requires administrative access to your Google Workspace account.

Contacts

Using the [Google People API](#), MoxiEngage synchronizes a user's contacts and contact details with Google Workspace. Contacts created in Google Workspace will appear in MoxiEngage. Contacts created in MoxiEngage are synchronized back to the user's contacts in Google Workspace.

Calendar

Using the [Google Calendar API](#), MoxiEngage displays the user's calendar events and appointments. Calendar events and appointments can also be added through MoxiEngage and are synchronized to the user's calendar in Google Workspace. **Email**

Using the [Gmail API](#), MoxiEngage sends certain email messages through user's mailbox. These email messages will appear in the Sent mail folder and will be delivered to the recipient from the mailbox just as if the user had sent the email from Gmail directly. MoxiEngage does not synchronize or inspect incoming email messages.



Service Account Setup

MoxiEngage is designed to utilize service account credentials for organizations that use Google Workspace (formerly G Suite) for administration of the company's email functions.

An email administrator in your company organization will need to perform steps to create a service account and obtain the necessary credentials for MoxiEngage to use.

Refer to [Google Workspace Setup Instructions for Administrators](#) and follow the provided step-by-step instructions to set up service account credentials, then enable the needed API endpoints and authorize the service account as an API client with appropriate OAuth scopes.

You will need to provide the service account key in JSON format, along with a regular user email address that we can use for testing.

Information Gathering

To enable configuration of the MoxiEngage integration, we will need to gather some key information and credentials from you, including the service account credentials, Client ID, and Tenant ID obtained by following the steps in the [Google Workspace Setup Instructions for Administrators](#) section of this document.

Next Steps

Verification of Credentials

MoxiWorks staff will retrieve all form submissions and begin the next step of the integration process. We will test the credentials you provided in the secure form to verify that the service account is able to connect to your email service and perform a synchronization for the test email address you supplied.

Outcome: Credentials Cannot be Verified

If your entered credentials cannot be verified, you will be notified. Your email administrator will need to resolve the issue and then provide us with the updated information via a new [Cognito](#) submission. We recommend redoing the entire process in its entirety and creating all new credentials along the way. If you continue to have issues we recommend you reach out to your email provider for further assistance.

Outcome: Credentials are Verified Successfully

If your entered credentials are verified successfully, we will store the credentials securely. Congratulations! This is a key milestone that enables us to continue the process of getting MoxiEngage enabled for your brokerage.

Security

MoxiWorks requires the use of a single service account in your Google Workspace, configured with domain-wide delegation. This service account must be authorized as a client to the Google API with the following OAuth scopes:



- <https://www.google.com/m8/feeds>
- <https://www.googleapis.com/auth/calendar>
- <https://www.googleapis.com/auth/gmail.compose>

All interactions between the MoxiWorks system and your user's account happens through this designated service account, authenticated by credentials (i.e., a JSON formatted key) generated and provided by your Google Workspace administrator. MoxiEngage never requires administrative access to your Google Workspace account.

Network Access

MoxiWorks systems communicate directly with the Google Workspace API over secure HTTPS/SSL connections.

Managing Shared Secrets and Credentials

For automated access, MoxiWorks makes use of methods native to our configuration management software. Credentials are stored in encrypted objects accessible only to servers with the relevant service role and environment. These credentials are pulled and decrypted during software deployment. Server identity is validated via pre-shared public/private key. Credentials are managed through a commercial password manager and any non-automated access is limited to the MoxiWorks Technical Operations team and, with customer approval, limited support personnel on an as-needed basis. See also:

<https://docs.chef.io/secrets.html#encrypt-a-data-bag-item>

<https://www.lastpass.com/en/enterprise>

Communications Policy for Security Breaches

In the unlikely event of a security breach where client data such as account credentials for registrar management, impersonation credentials, and the like may have been compromised, MoxiWorks Technical Operations and/or Account Management staff will notify affected clients. If the client is aware of a potential security breach, they should notify MoxiWorks immediately so that we may contain and mitigate potential risk in a timely manner. In either case, a change to Impersonation account credentials will be coordinated between both parties.

Google Workspace Setup Instructions for Administrators

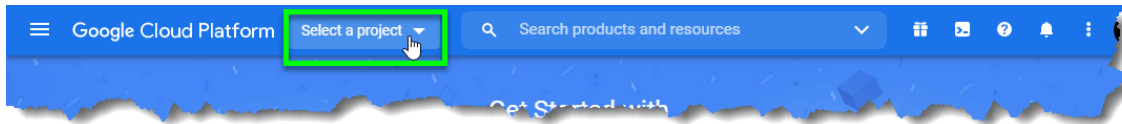
The following steps describe the recommended process for creating a service account in Google Workspace for use with your brokerage's MoxiWorks integration.

Create Google Service Account Credentials with the "Owner" Role

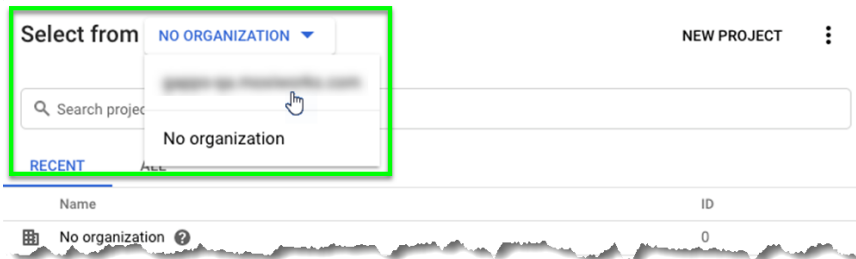
Jump to this step in the [training video](#).

1. Login to your [Google Cloud Platform](#).

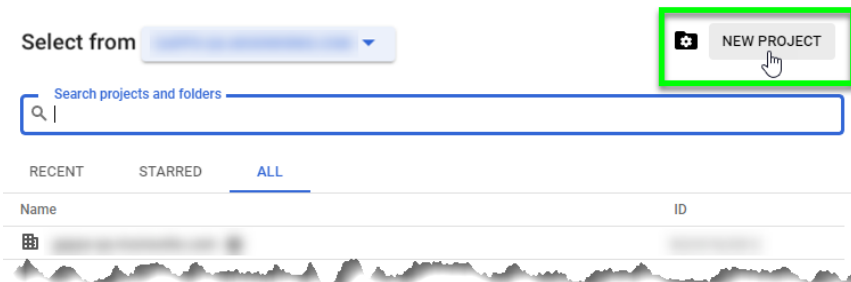
2. Click on the “Select a project” dropdown button.



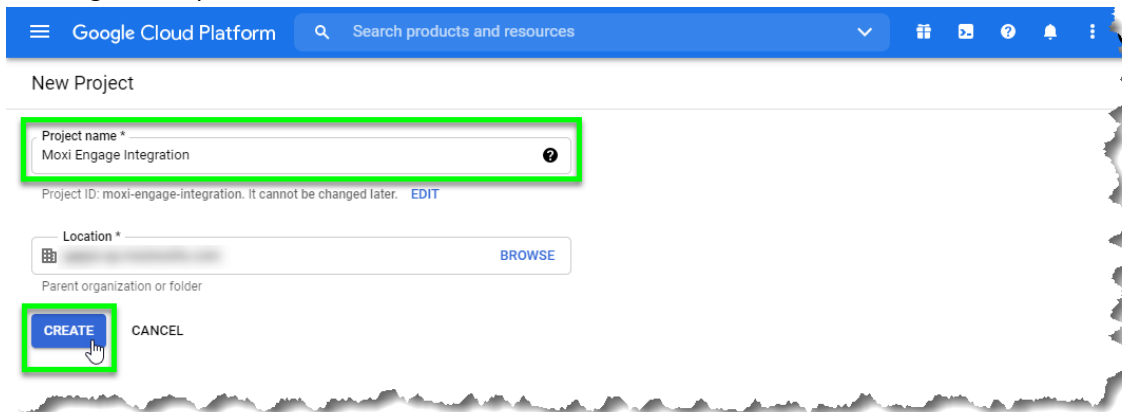
3. Choose your organization’s Google Workspace identifier from the dropdown list.



4. Click on the “NEW PROJECT” button.



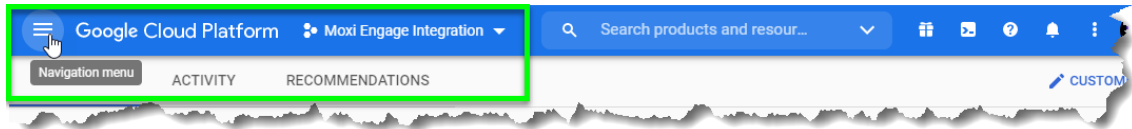
5. Enter a meaningful project name to represent MoxiEngage (e.g., “Moxi Engage Integration”), then click on the “CREATE” button.



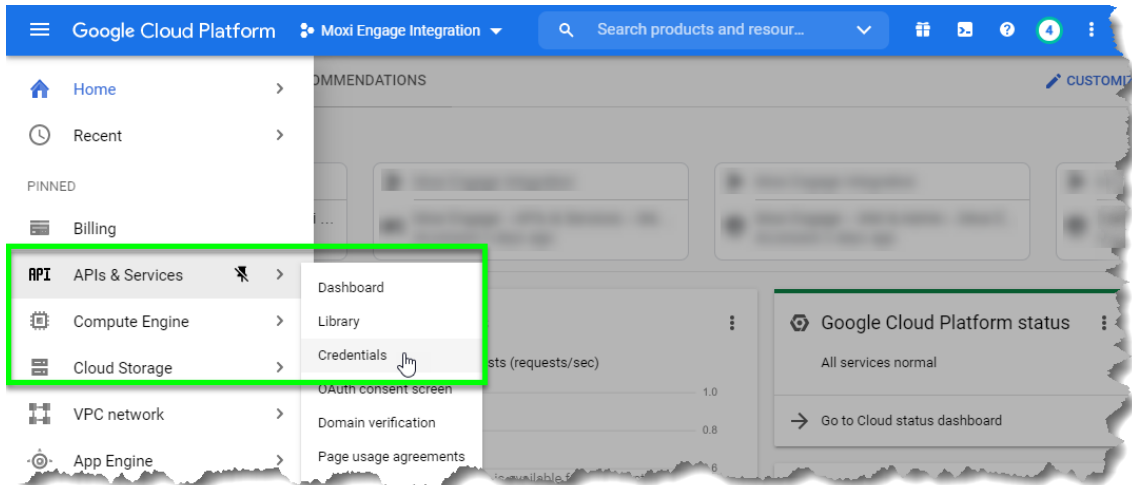
Note

Now that you have created a new project, you should see the name of the project displayed in the header area next to the “Google Cloud Platform” title.

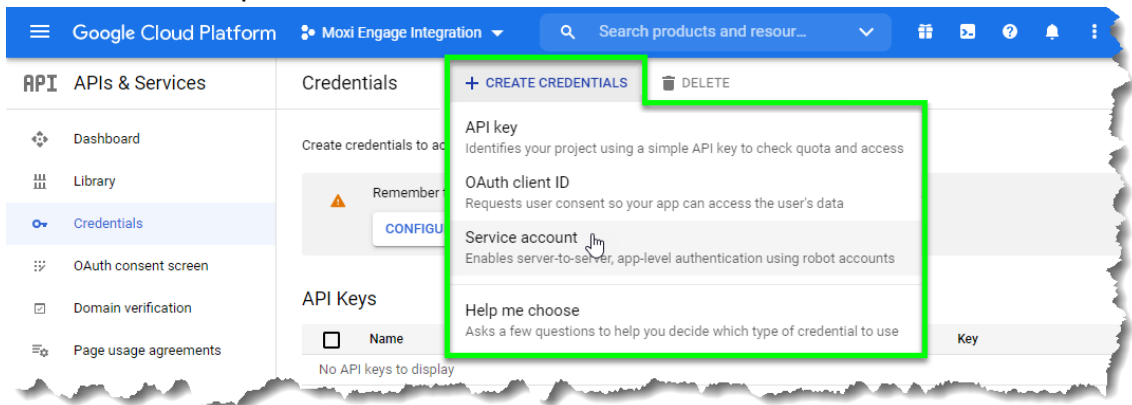
6. Click on the three horizontal lines next to the “Google Cloud Platform” label to access the navigation menu.



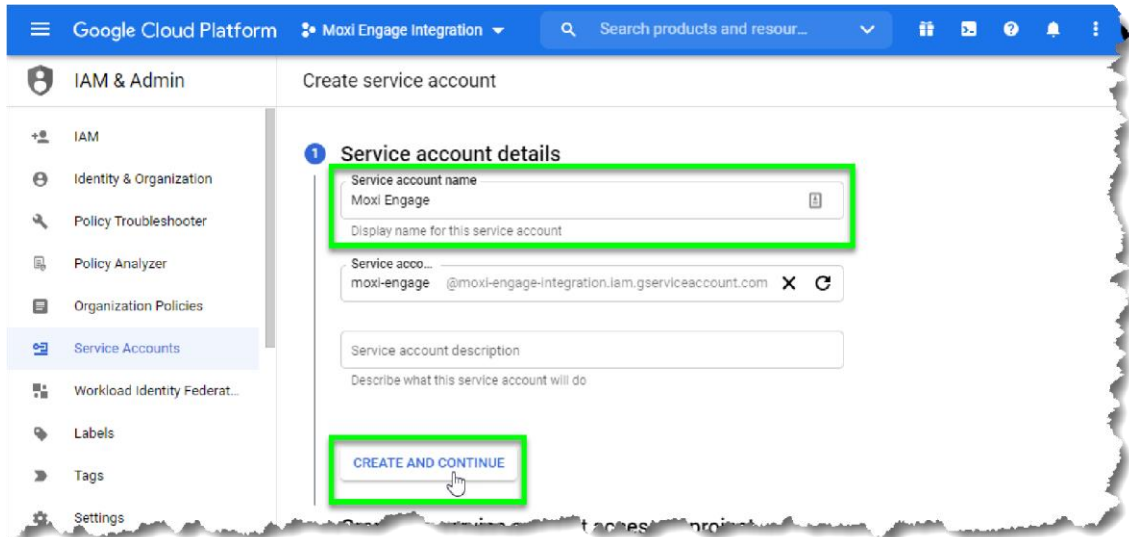
7. Using the Google Cloud Platform menu, navigate to the “APIs and Services” => “Credentials” option.



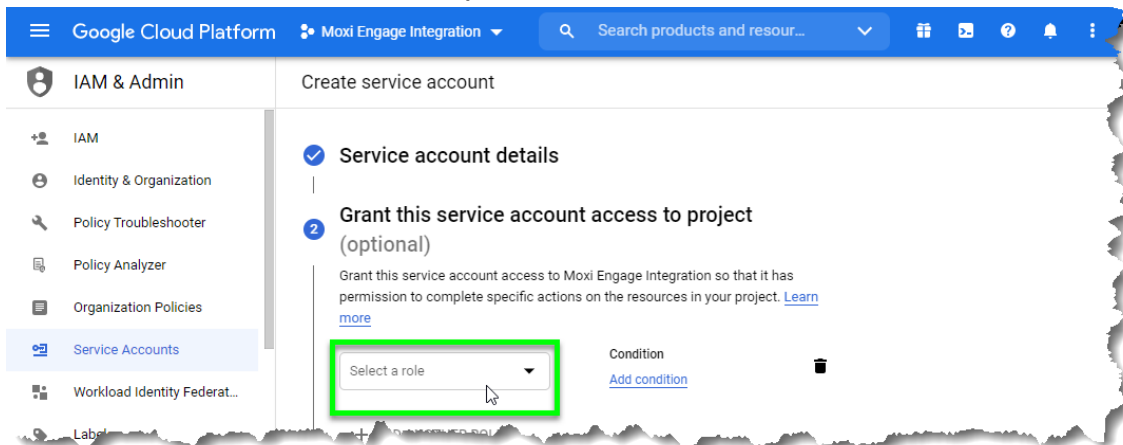
8. Click on the “Create Credentials” dropdown and select “Service account” from the available options.



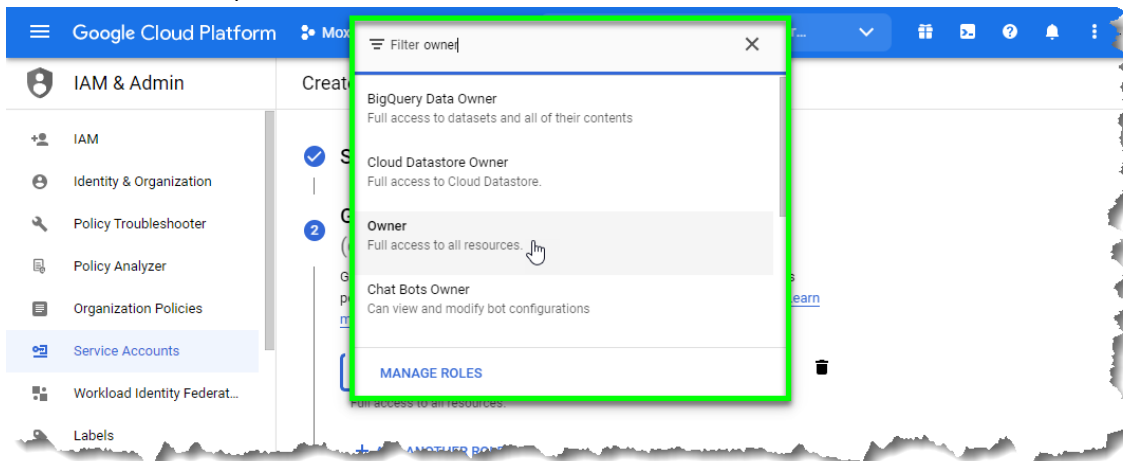
9. Enter “Moxi Engage” in the “Service account name” text box, then click on the “CREATE AND CONTINUE” button.



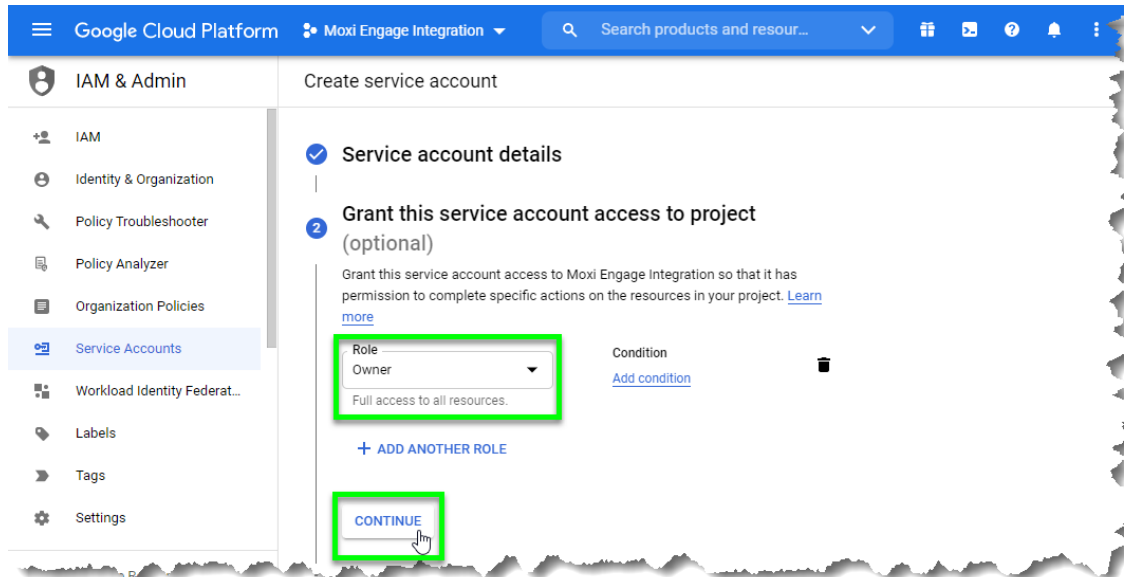
10. Click on the "Select a role" dropdown.



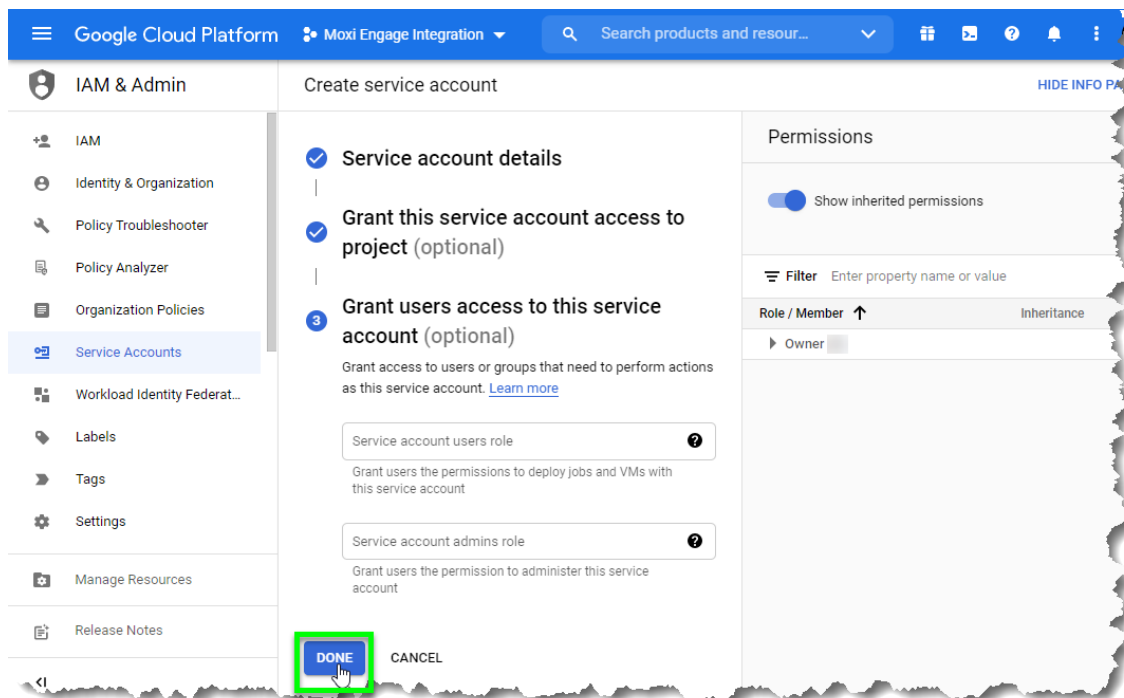
11. Enter "owner" in the search filter box, then select "Owner" from the list. (Alternatively, navigate the list to locate and select "Project" => "Owner" from the available roles.)



12. With “Owner” selected as the “Role” for the service account, click on the “CONTINUE” button.



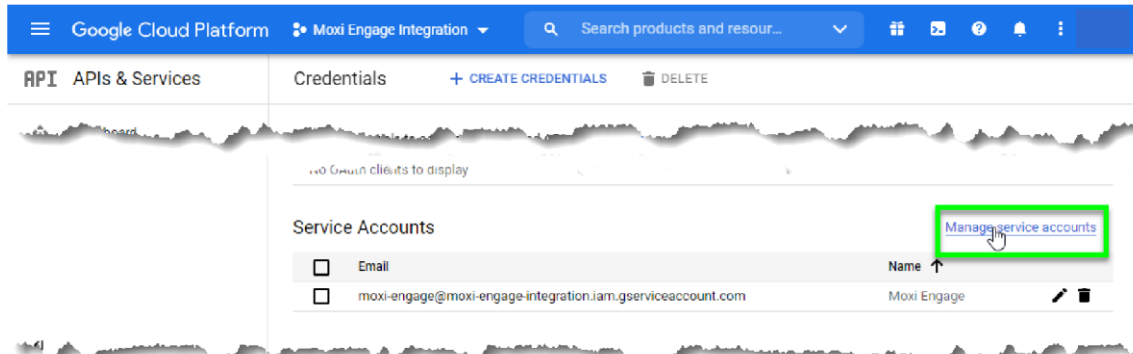
13. Click on the “DONE” button.



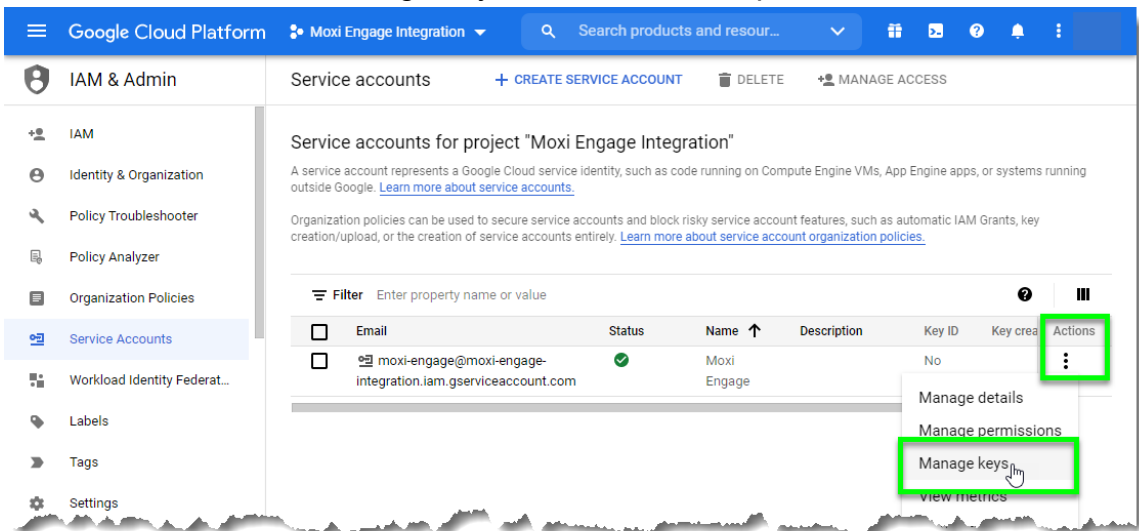
Create a Key for the MoxiEngage Service Account in JSON Format

Jump to this step in the [training video](#).

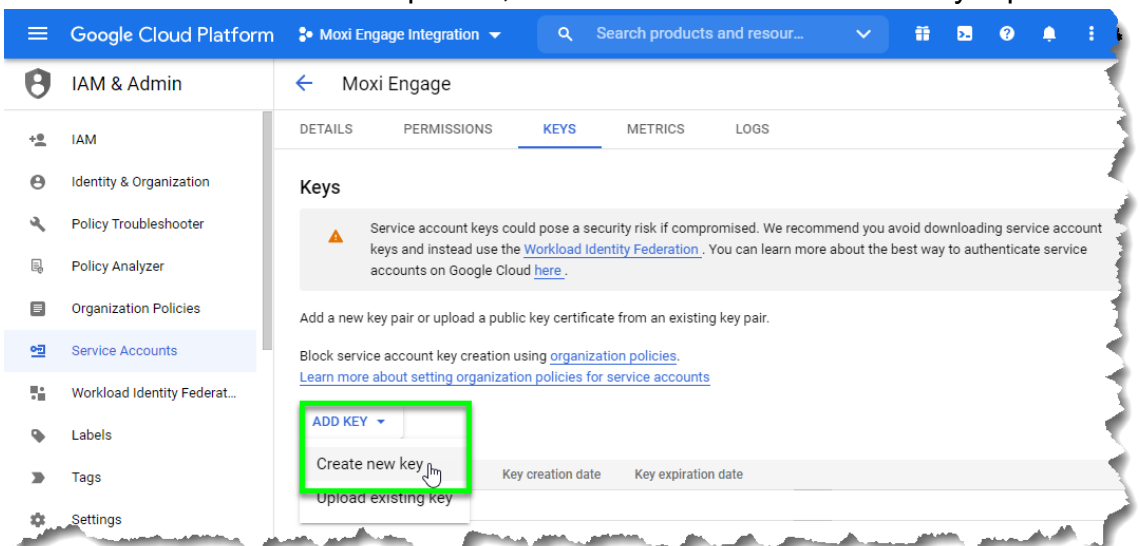
1. Click on the “Manage service accounts” link displayed on the righthand side of the “Credentials” list screen.



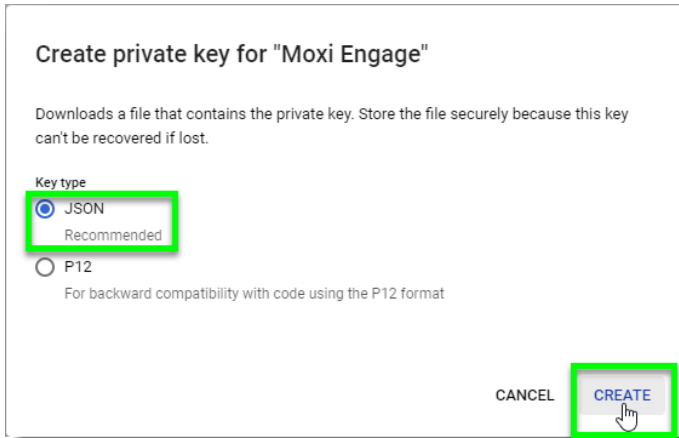
2. Click on the three dots in the “Actions” column next to the Moxi Engage service account, then select “Manage keys” from the list of options.



3. Click on the “ADD KEY” dropdown, then select the “Create new key” option.

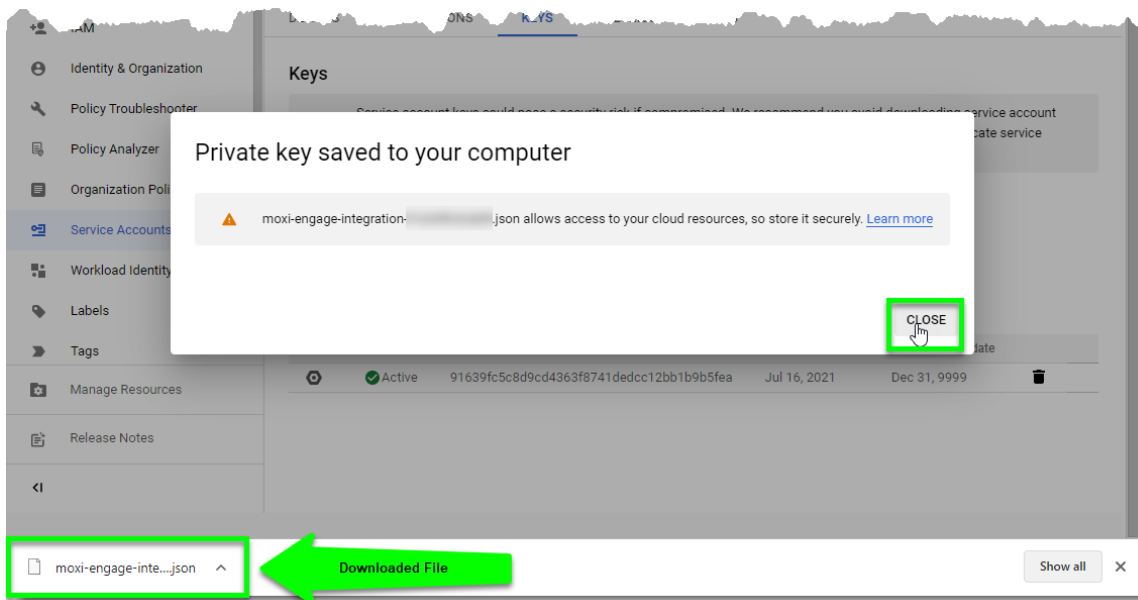


4. Ensure the “JSON” radio button is selected for the “Key type” option, then click on the “CREATE” button.



Note When you click on the “CREATE” button, a JSON file will be generated automatically and downloaded to your computer. Make a note of the location where the JSON file was downloaded and saved. You will need to locate this file later in the process.

5. A popup will let you know that a private key was saved to your computer. Click on the “CLOSE” button to acknowledge the message and continue.



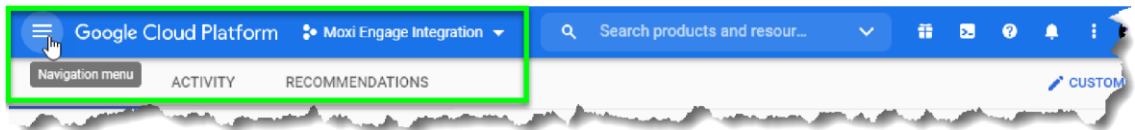
Enable Gmail API

Note

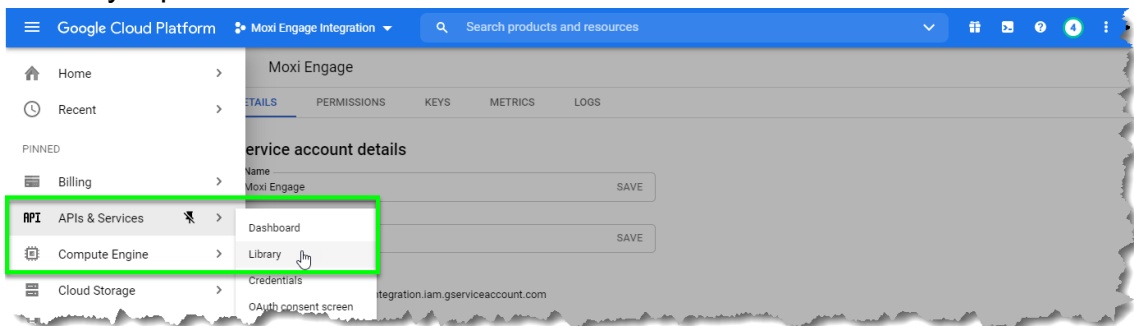
You have already created the credentials necessary for MoxiEngage to use this API. Ignore any warnings or prompts that would lead you to create additional credentials.

Jump to this step in the [training video](#).

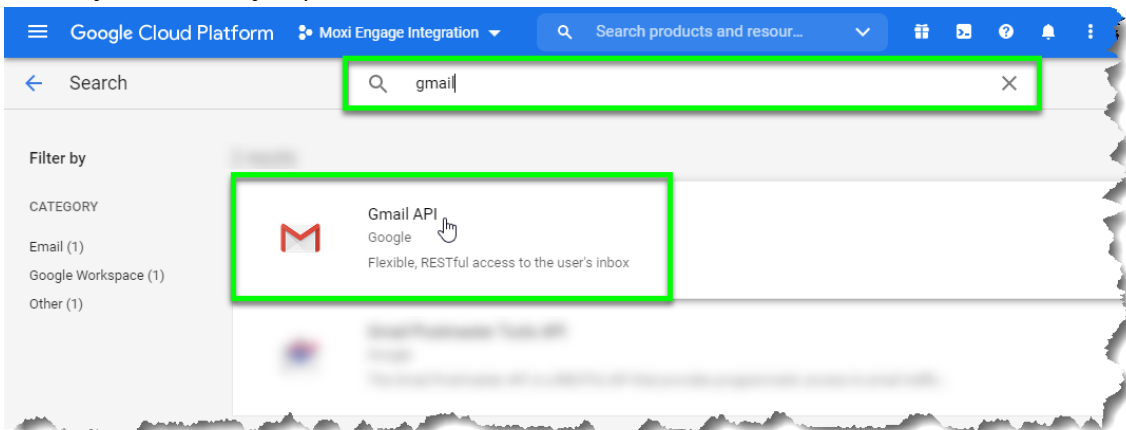
1. Click on the three horizontal lines next to the “Google Cloud Platform” label to access the navigation menu.



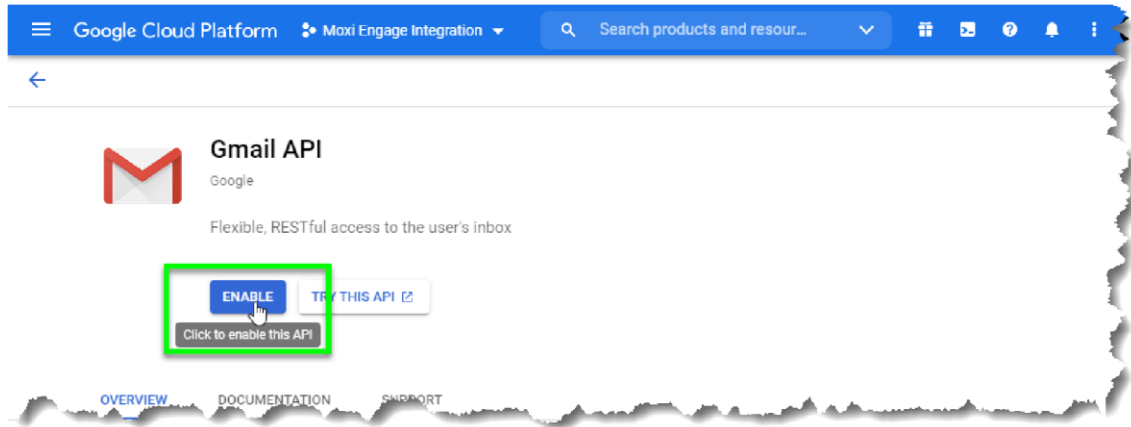
2. Using the Google Cloud Platform menu, navigate to the “APIs and Services” => “Library” option.



3. Click on the “Gmail API” card (use the search box to find this card if it is not readily visible to you).



4. Click on the “ENABLE” button.



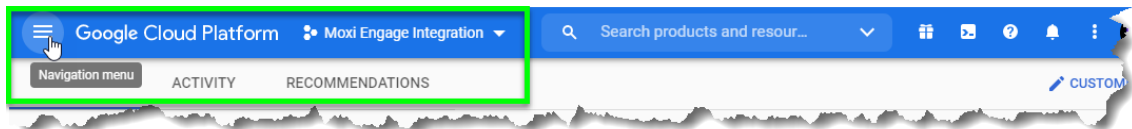
Enable Calendar API

Note

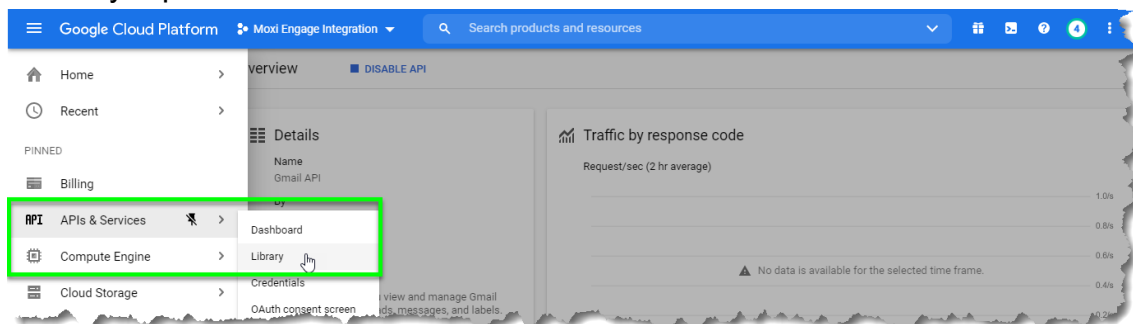
You have already created the credentials necessary for MoxiEngage to use this API. Ignore any warnings or prompts that would lead you to create additional credentials.

Jump to this step in the [training video](#).

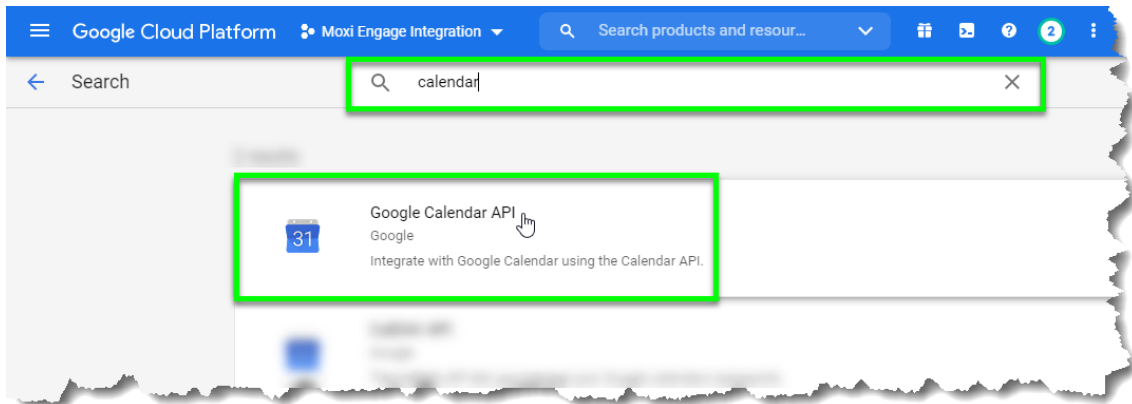
1. Click on the three horizontal lines next to the “Google Cloud Platform” label to access the navigation menu.



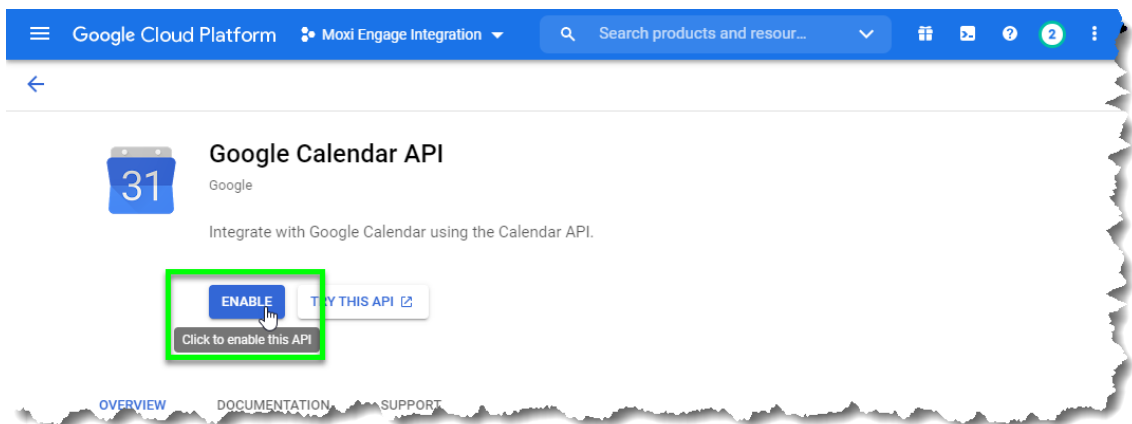
2. Using the Google Cloud Platform menu, navigate to the “APIs and Services” => “Library” option.



3. Click on the “Calendar API” card (use the search box to find this card if it is not readily visible to you).



4. Click on the “ENABLE” button.

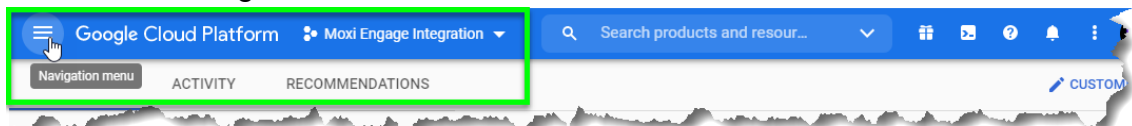


Enable People API

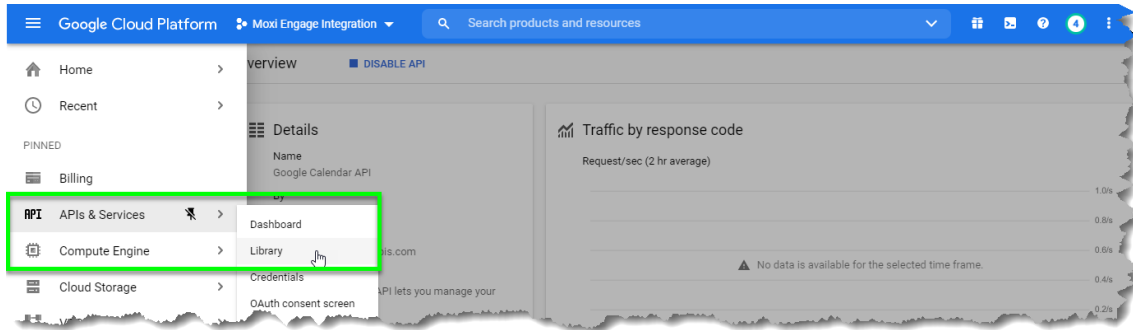
Note

You have already created the credentials necessary for MoxiEngage to use this API. Ignore any warnings or prompts that would lead you to create additional credentials. Jump to this step in the [training video](#).

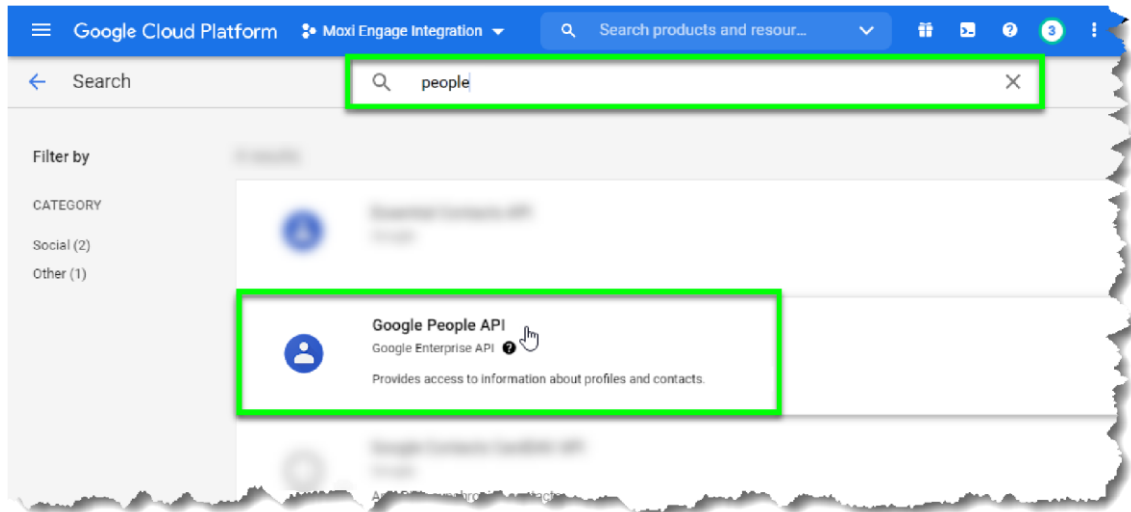
1. Click on the three horizontal lines next to the “Google Cloud Platform” label to access the navigation menu.



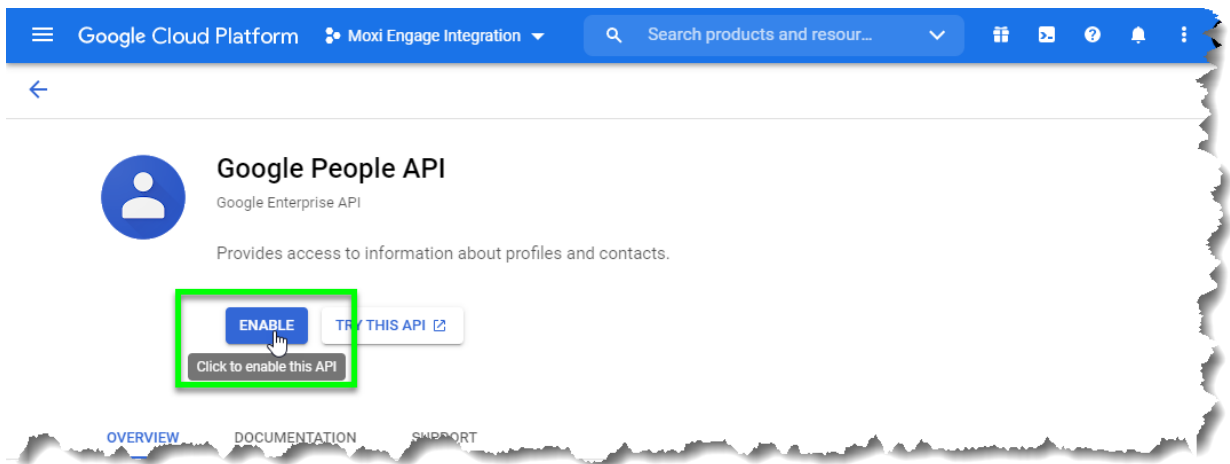
2. Using the Google Cloud Platform menu, navigate to the “APIs and Services” => “Library” option.



3. Click on the “Google People API” card (use the search box to find this card if it is not readily visible to you).



4. Click on the “ENABLE” button.

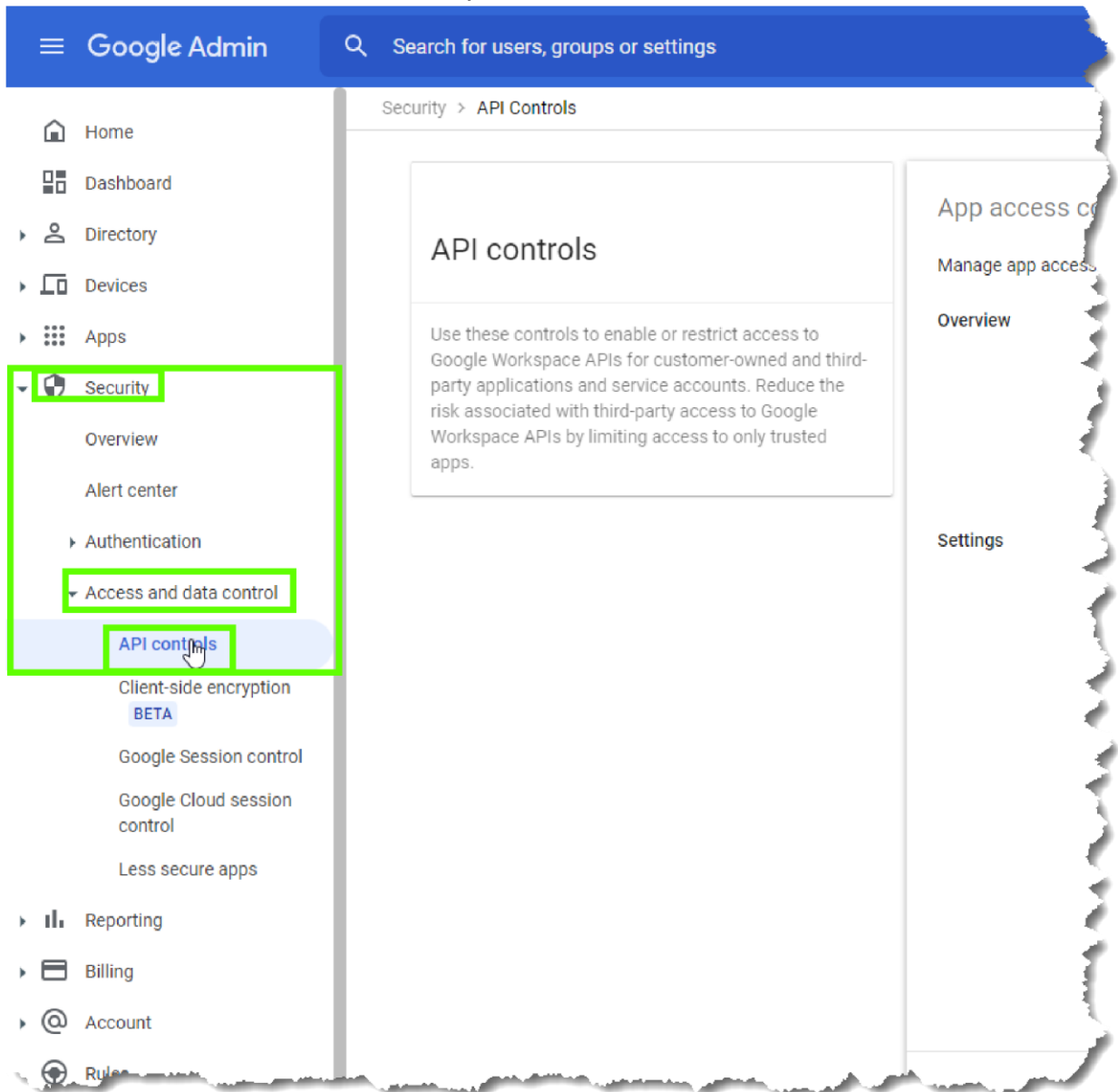


Authorize the MoxiEngage Service Account as an API Client

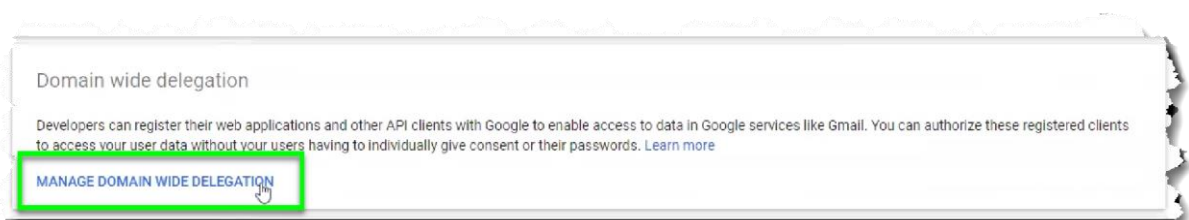
Jump to this step in the [training video](#).

1. Login to your [Google Admin Console](#).

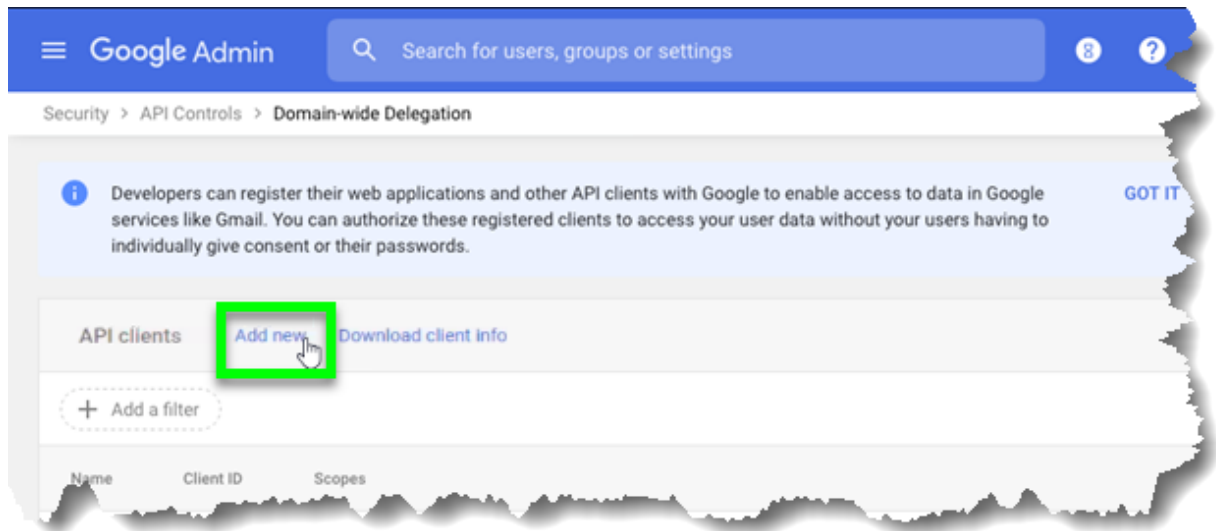
2. Click on the three horizontal lines next to the “Google Admin” label to access the navigation menu.
3. Using the Google Admin Console menu, navigate to the “Security” => “Access data and control” => “API controls” option.



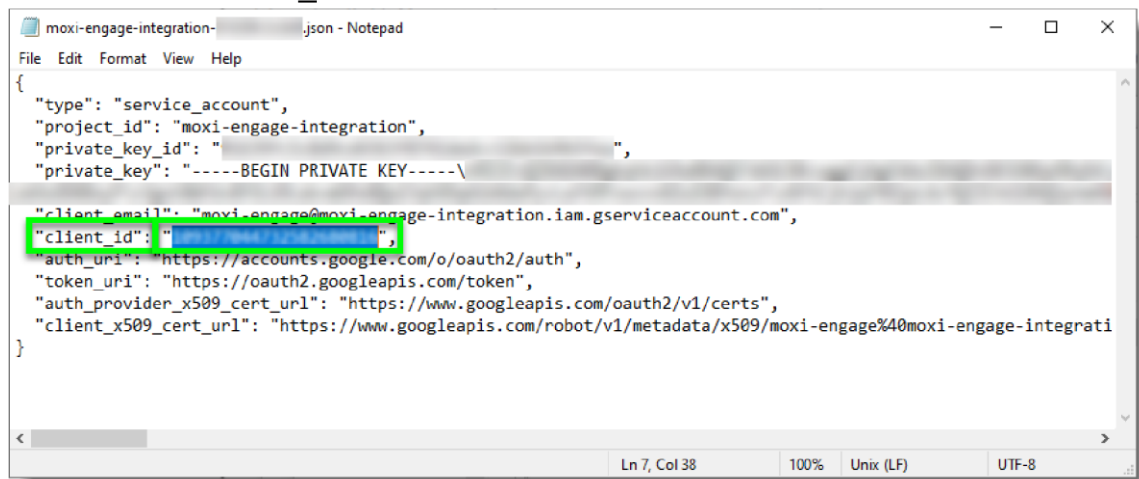
4. From the API Controls page, locate the “Domain wide delegation” section and click on the “MANAGE DOMAIN WIDE DELEGATION” link.



5. Click on the “Add new” link.



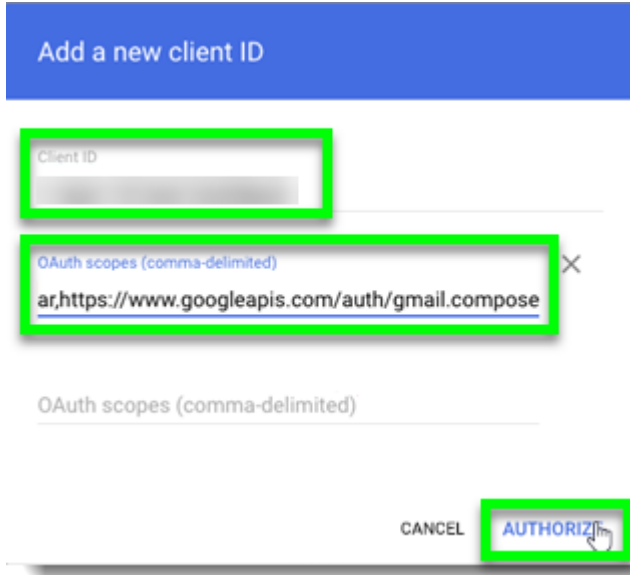
6. Locate the Moxi Engage service account client id in the JSON format credential file downloaded earlier:
 - a. Open the JSON file in a text editor (e.g., *Notepad* if using Windows, *TextEdit* if using macOS).
 - b. Find the “client_id” label in the text of the file.



- c. Select the value for the “client_id” and copy it to your clipboard.
7. Paste the client-id obtained from the JSON file into the “Client ID” box.
 8. Enter the following text exactly as it appears into the “OAuth scopes (commadelimited)” field (you may copy and paste for accuracy):

```
https://www.google.com/m8/feeds,  
https://www.googleapis.com/auth/calendar,  
https://www.googleapis.com/auth/gmail.compose
```

9. Click on the “AUTHORIZE” button.



Add a new client ID

Client ID

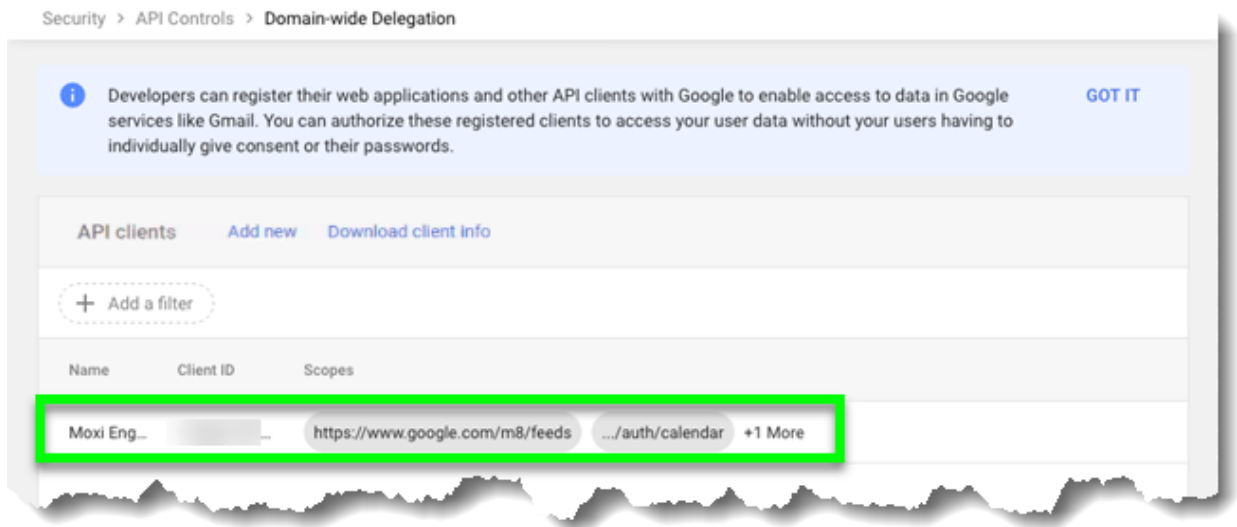
OAuth scopes (comma-delimited) ×

ar,https://www.googleapis.com/auth/gmail.compose

OAuth scopes (comma-delimited)

CANCEL AUTHORIZE

10. Verify that the Moxi Engage service account is displayed on the list of API clients.



Security > API Controls > Domain-wide Delegation

i Developers can register their web applications and other API clients with Google to enable access to data in Google services like Gmail. You can authorize these registered clients to access your user data without your users having to individually give consent or their passwords. GOT IT

API clients [Add new](#) [Download client info](#)

+ Add a filter

Name	Client ID	Scopes
Moxi Eng...	...	https://www.google.com/m8/feeds .../auth/calendar +1 More

Tips and Further Information

- Why is this process necessary for Engage to function for our agents?
 - Engage functions through a sync between itself and an agent's email. Without an email to sync to Engage cannot work.
 - Engage can sync to an office-provided MS365 or Google Workspace account, provided that your office completes the Integration Process.
 - Integration process can only be completed by someone with admin credentials to the office email tenant. ○ Once you've completed the process you must submit those credentials to us here:

<https://www.cognitofrms.com/MoxiWorks2/moxiworksrealogyengagedcredentialsform>

- If you do not have an office provided email or prefer not to do this process for any reason, **your agents will always have the option to sync using a Free Gmail account.** No further action is required by your office in this case.
- Notes about known issues and what to do
 - **3rd Party Provided Email** - Offices with email accounts purchased through third party companies such as Go-Daddy may not be able to complete process due to limitations they place on admin access. Your agents will still be able to sync with Free Gmail.
 - **Access / Permissions** - If you do not have admin privileges to your email tenant you must escalate to someone who does or reach out to your email provider. Moxi cannot assist you with your permissions in your email tenant.
 - **Stuck?** - If you are stuck on a step of the process, compare your screen to the screenshot shown for that step and ensure they look the same. Additionally, each section of the process includes a time stamp and link to a video going through the process step by step.
 - **Failed Submission** – If you have submitted credentials and have subsequently been notified that your submission failed, we recommend redoing the setup process entirely. During this new setup, do not use anything created in the previous attempt, instead create a new service account with a new name, etc. If you use any previously created accounts, permissions, etc you will likely experience the same issue.
 - Most offices that have resubmitted credentials after failing their first submission passed on their 2nd attempt.
 - When redoing the process, it is critical that any field where you name something is filled in differently that your previous attempt. If you reuse names from a previous attempt this will likely cause an issue, even if you have deleted the previously created account / permission. We recommend putting a number at the end of the name that reflects the attempt # (i.e. MoxiEngage2 & Impersonation2)
 - If you continue to have issues we recommend reaching out to your email provider and requesting assistance.

Related Resources

[Google Workspace Support](#)

[Microsoft Office Support](#)