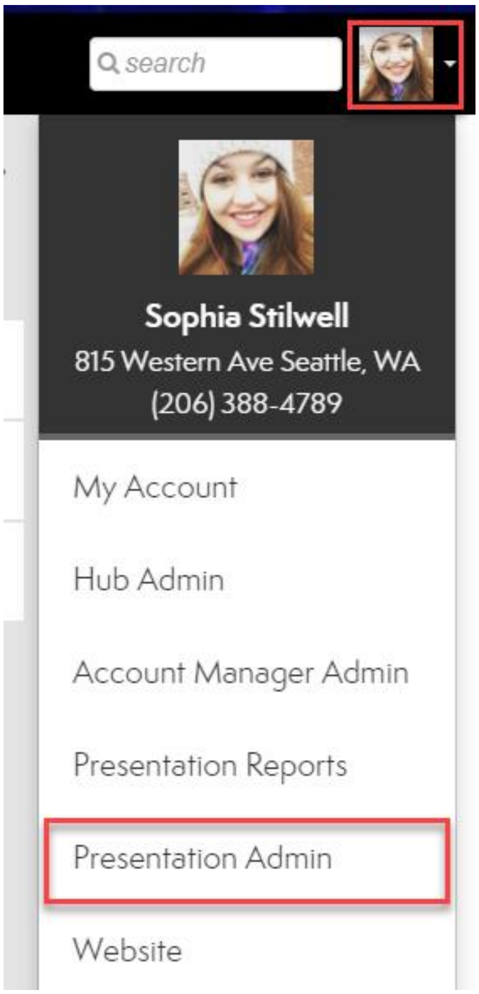
How to Create a Template

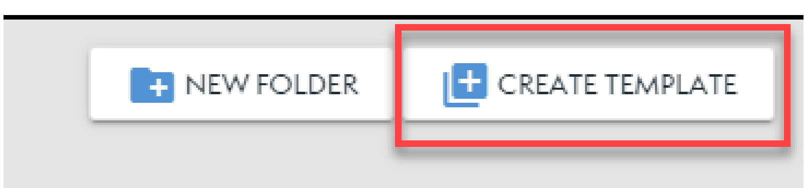
Moxi Presentation Admin can be used to create new templates that can be used by any number of agents, offices or regions. It's a great way to create and distribute marketing materials or other types of presentations that can be utilized easily by agents.

How to Create a Template

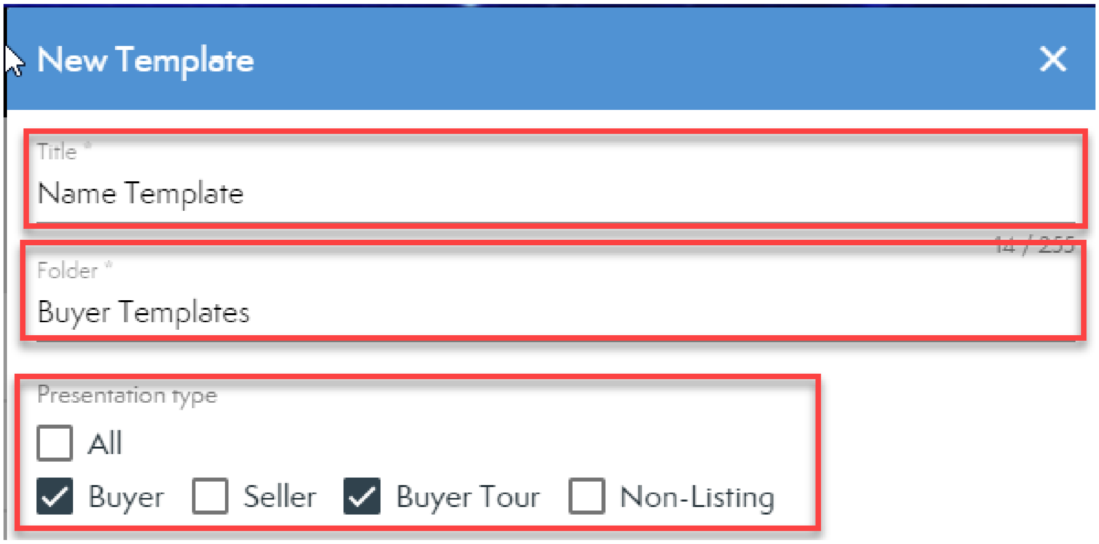
1. Select **Presentation Admin** from the account drop-down menu.



2. Select **Create Template** from the top right.



3. Add a **Name** and **Folder** for the template to be hosted in. Then select desired **Presentation Types** for the template.



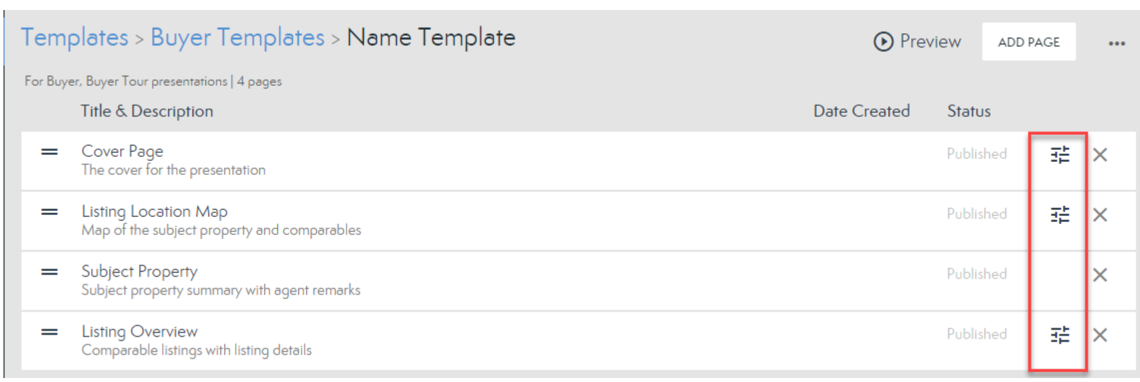
4. **Set Permissions** for who can use and see this template. This can be changed later if needed.

5. Select **Save as Draft**.

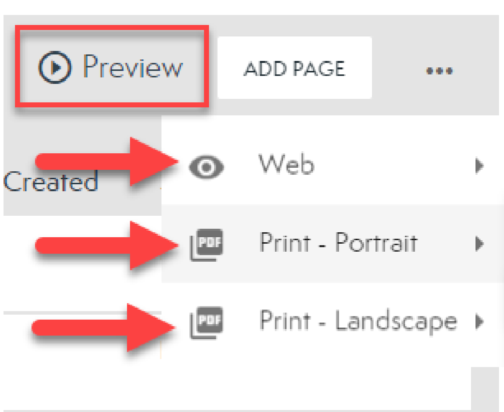
6. To add pages, select the **Add Page** button in the top right.

7. From the page folders, choose which pages you would like to include and select **Add** to include them in the template. Select **Done** when finished.

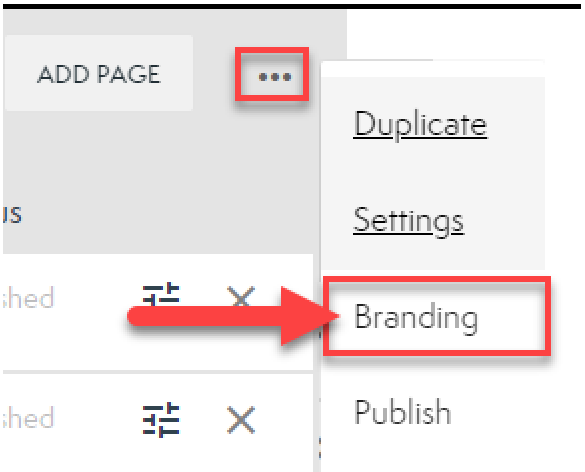
8. Make any page adjustments needed using the **Settings Icon**.



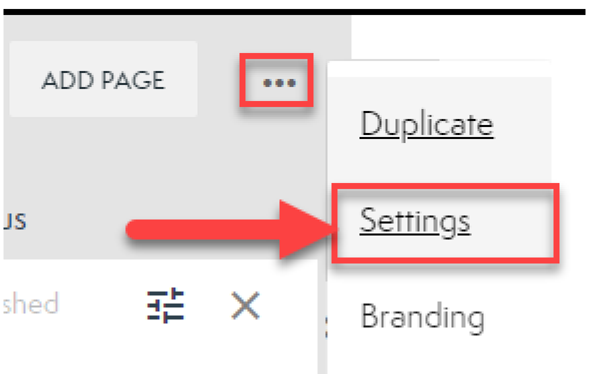
9. Select **Preview** to see how the template will look for agents.



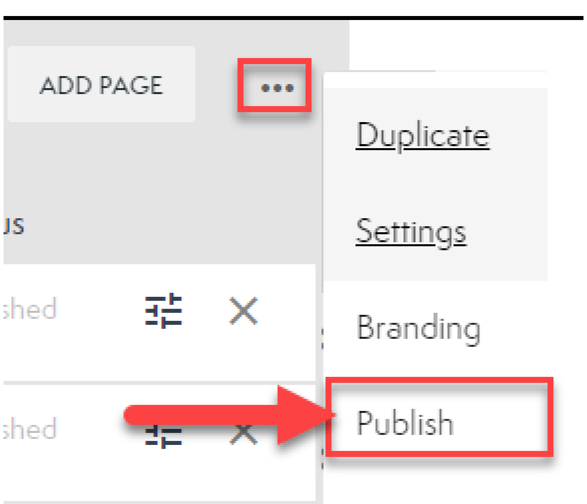
10. To adjust branding options, select the **Three Dots** and choose **Branding**.



11. To change any permissions or adjust the template types, select the **Three Dots** and choose **Settings**.



12. Once you have created your template, select the **Three Dots** and choose **Publish**. Agents will now be able to see the template in their accounts.



13. Share if needed by choosing the **Three Dots** and selecting **Share**.