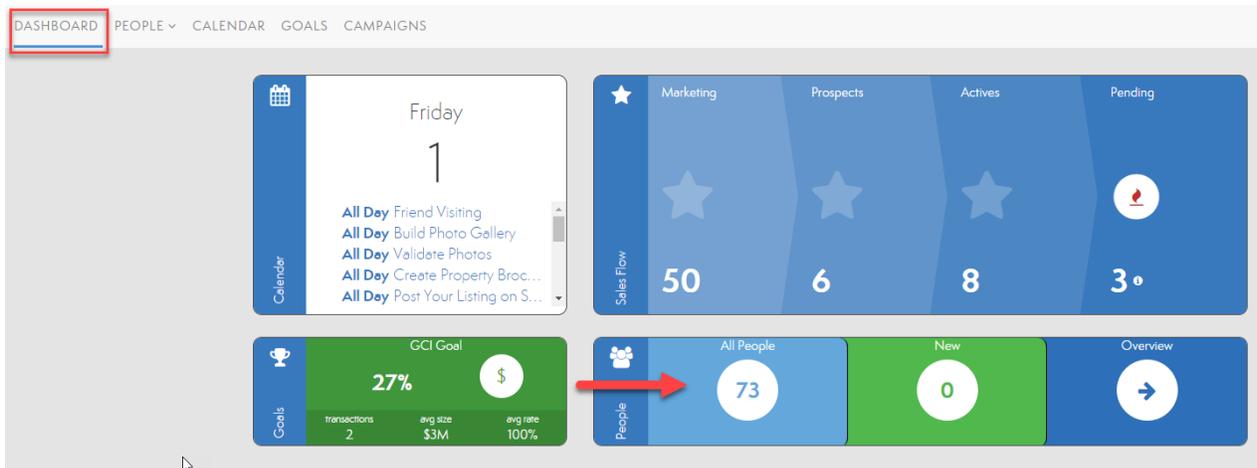


Adding Multiple People in a Transaction

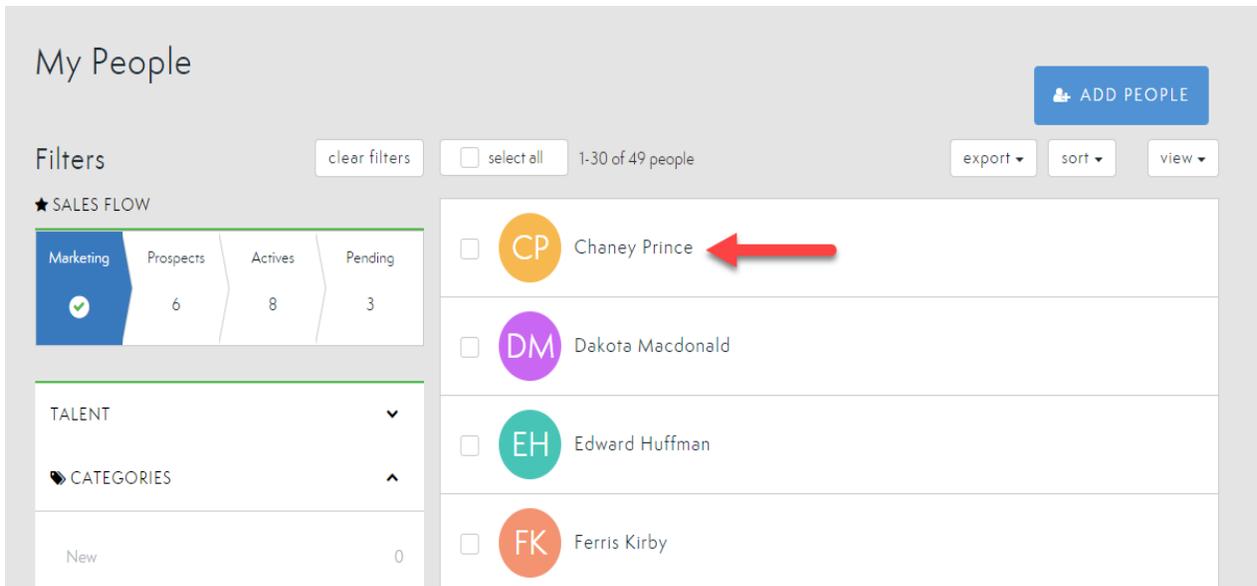
When adding transactions to Engage, sometimes those transactions are associated with more than one of your clients. MoxiEngage makes it easy to add in multiple people in a transaction so you can easily view and manage that transaction no matter what where you are or what clients profile you are on. Check out how to add multiple people to a single transaction in Engage blow.

Adding Multiple People in a Transaction

1. From the Engage Dashboard, select **All People**.



2. Select one of the clients you would like to add the transaction information for.



3. Select **Make This Person a Prospect**. If you have an existing transaction for this client, simply select **Details** and then **Edit**.

CP
CHANEY PRINCE

marketing prospects actives pending

Here's a marketing plan to get you started.
Marketing Plan

MAKE THIS PERSON A PROSPECT

PROFILE
NOTES
ACTIVITY
Marketing Plan

TASKS DETAILS

13 tasks remaining

add task

this week DUE

Test Task for Thom 6/2/2019

Send Concierge Invite 6/12/2019

TASKS **DETAILS**

Property Details

delete or deactivate edit

MLS
Yes

Category
buyer

Start Date
November 1, 2019

4. Enter all needed transaction details such as transaction type and MLS number.

Create Prospects Transaction

DONE CANCEL

This person is a... BUYER SELLER

Transaction Name Chaney Prince - buyer

MLS Non-MLS

MLS # 415475

Transaction linked to MLS listing
Changes made to the listing in the MLS will be reflected here and may take several hours to appear.

MLS Yes Category buyer

Address 7904 NE 130th St
Kirkland, WA 98034

Listing Price \$290,000

Bathrooms 3

MLS # 415475

Bedrooms 4

Square Feet 2,030

Commission Percent 3 Flat Fee \$

5. Under **Associated People**, type the client's name you would like to add to the transaction. Then select their name from the drop-down. You will see their name add to the text field which indicated they have been added to the transaction. Note: If you need to remove an additional client from the transaction, select the **X** next to their name to remove them.

Associated People

Search for clients to add

Clients

Jill Smith ✕ Type client's name

Q

6. Select **Done** to save your transaction.

Create Prospects Transaction



DONE

CANCEL

Your transaction will now appear in all associated client's profiles and all names will appear in the Goal section for that transaction.