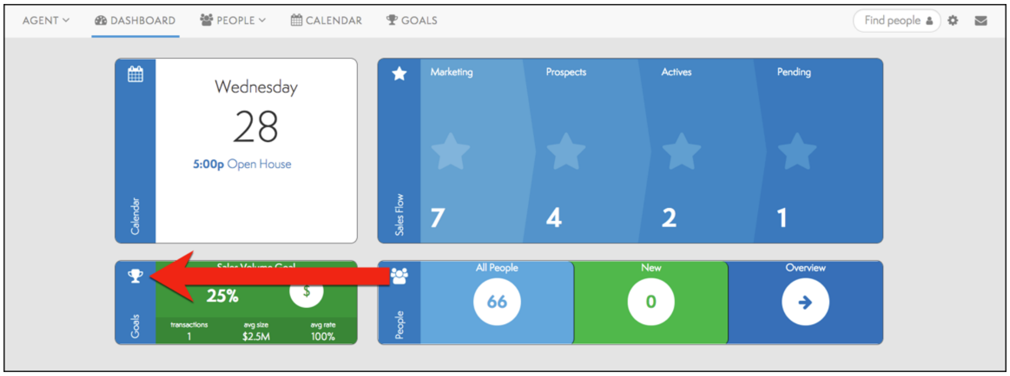
Moxi Engage Goals Summary

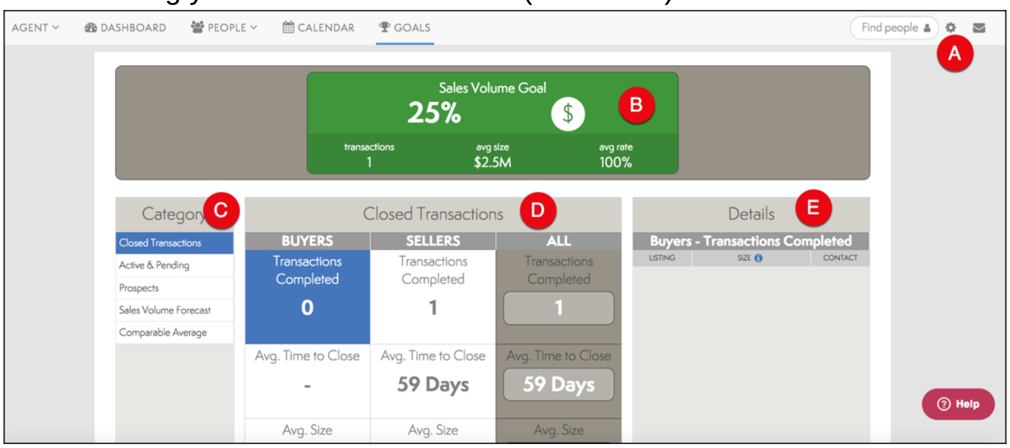
The first step in getting started with Engage is setting your Sales Volume Goal. Once this goal is set, you can track your goals throughout the entire year! Below is a summary of the goals module.

To get to the Goals Module:

1. Select the **Trophy Icon** in the **Goals Section** (see below, indicated by the red arrow).



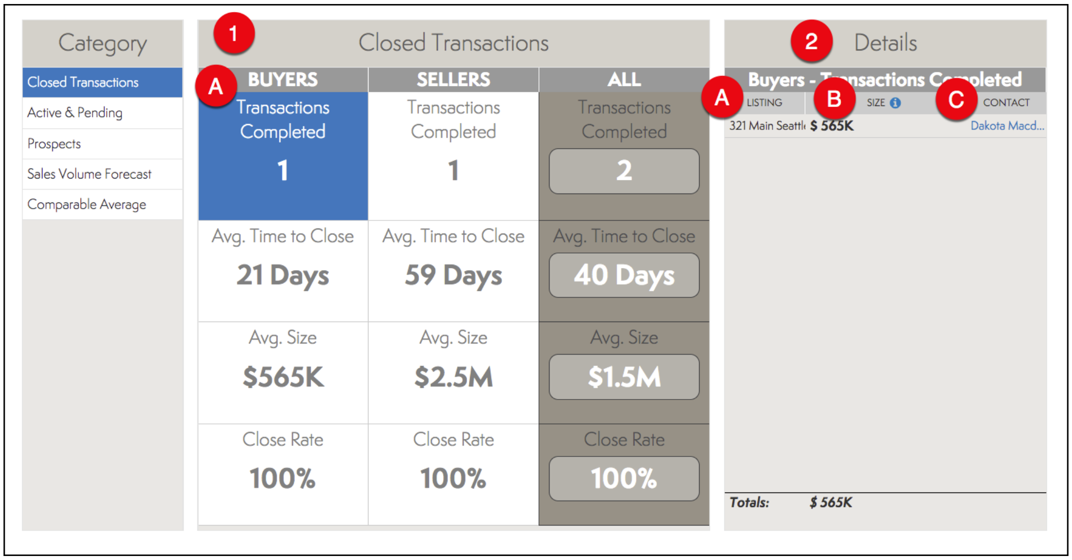
2. This will bring you to the **Goals Screen** (see below).



3. Now you can review:
    a. **GEAR ICON:** This is the Settings menu for this section, which includes:
        - Setting your Sales Volume goal
        - Setting your commission rate
        - Reviewing Help Docs/Videos
        - Providing Feedback to our team
    b. **GOALS SECTION:** The Goals Section from the Dashboard allows you to look at your Sales Volume Goal and stats while you view individual categories and details.
    c. **CATEGORY:** Here you can select One of Five different categories.
    d. **CATEGORY STATS:** The name of the column here will vary depending on which category you are viewing.
    e. **DETAILS:** This will show you the details of the stats you are looking (I.E. If you select **Transactions Completed** under Closed Transactions, the details will show an itemized list of your Completed Transactions.)

Closed Transaction

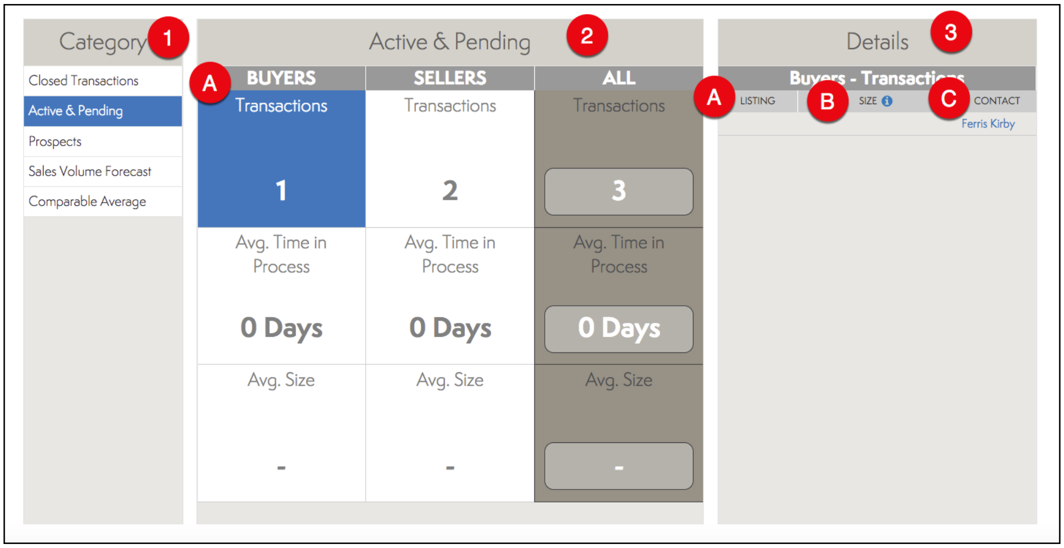
Displayed here is the list and stats for all closed transactions.



1. **CLOSED TRANSACTIONS:** The list and stats of all closed transactions, organized by Buyers, Sellers, and All.
   a. **Buyers, Sellers, and All:** The list of all stats associated with People designated as Buyers, Sellers, and All. In this column, you can view:
      - **Transactions Completed:** Total Transactions you have closed.
      - **Average Time to Close:** The average time it took you to close a Transaction. This is calculated from the time you moved your client to the Actives Zone to close.
      - **Average Size:** The average price for a Transaction.
      - **Close Rate:** The rate at which you convert clients into closed transactions. This is calculated by Closed Transactions/Clients moved from Actives or Pending back to Prospects or Marketing.
         - **EXAMPLE:** You have a client who has a pending transaction, but the transaction falls apart. Now your client decides to wait before trying again. You still want to stay in contact with them, and you move them out of the Pending Zone and back into the Prospects Zone. This is considered a Lost Transaction.
2. **DETAILS:** The list of the details specific to the item you are viewing. In the example above, a completed Buyers Transaction is displayed (see above, highlighted in blue).
   a. **Listing:** The listing address for the selected transaction.
   b. **Size:** For this example, this is the purchase price for the transaction.
   c. **Contact:** The person associated with this transaction.

Active & Pending and Prospects

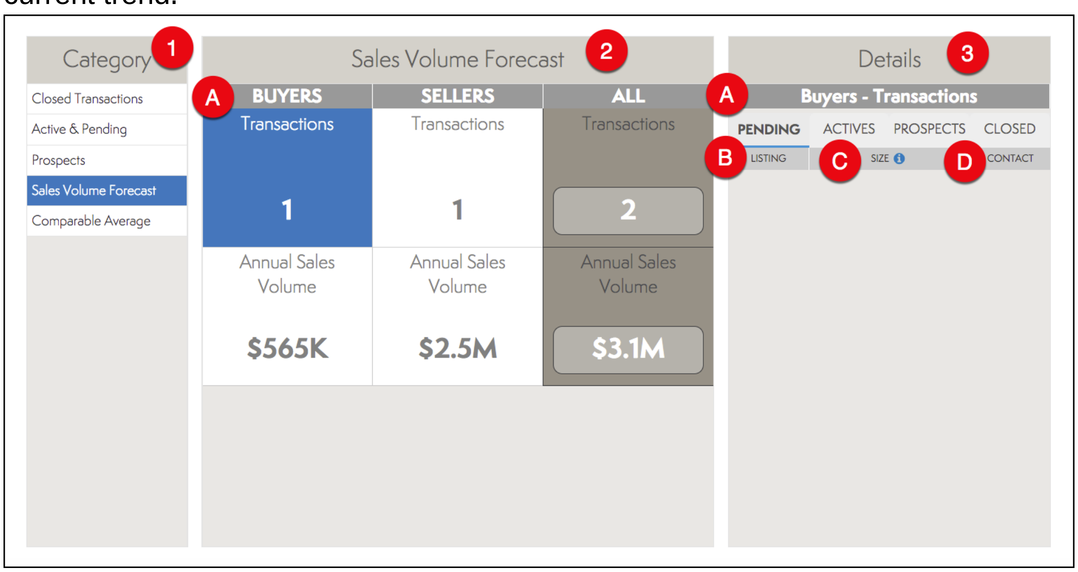
This category will display all of the current stats for all clients in the Active & Pending and Prospect Zones.



1. **CATEGORY:** Select the category you would like to view. In this example we are viewing **Active & Pending and Prospects**.
2. **ACTIVE & PENDING:** The list and stats of transaction, sorted by Buyers, Sellers, and All.
    a. **Buyers, Sellers, and All:** The list of all stats associated with People designated as Buyers, Sellers, or All. In this column, you can view:
        - **Transactions:** Total Transactions in the Active and Pending Zones.
        - **Average Time in Process:** The average time a person spends in the Active and Pending Zones.
        - **Average Size:** The average target price of Transactions in the Active and Pending Zones.
3. **DETAILS:** The list of the details specific to the item you are viewing. In the example above, an Active & Pending Transaction is displayed (see above, highlighted in blue).
    a. **Listing:** The listing address for the selected transaction.
    b. **Size:** For this example, this is the purchase price or target price for the transaction.
    c. **Agent:** The agent associated with this transaction.

Sales Volume Forecast

If you want to view your Sales Volume forecast you can view this category which is based off of your current trend.

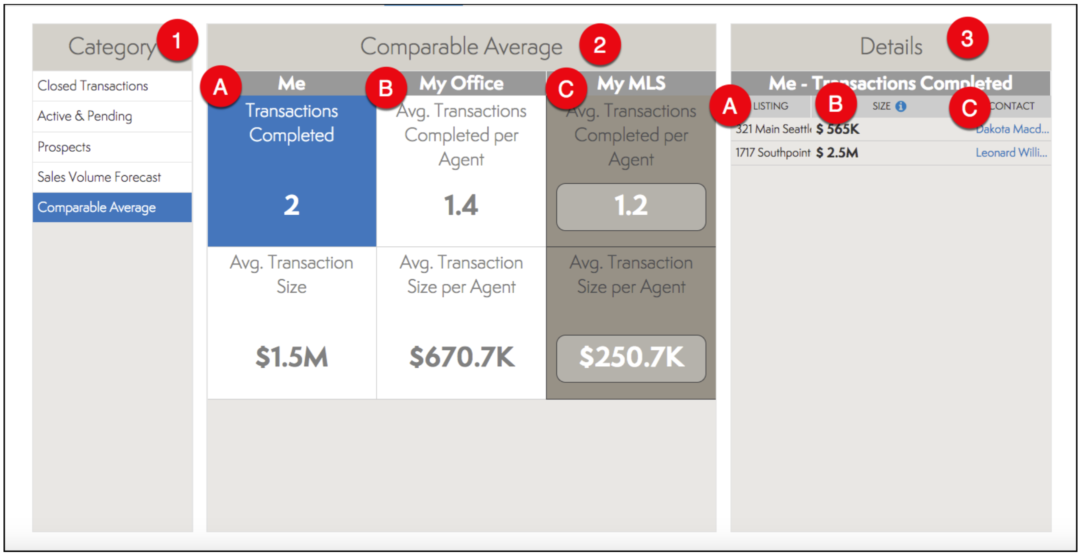


1. **CATEGORY:** In this example we are viewing **Sales Volume Forecast**.

2. **SALES VOLUME FORECAST:** The list and stats of all transaction, sorted by Buyers, Sellers, and All.
    a. **Buyers:** The list of all stats associated with People designated as Buyers, Sellers, or All. In this column, you can view:
        - **Transactions:** Total Transactions you have the potential to close.
            - This is calculated using your current **Closed Transaction Stats**, **Active & Pending Stats**, and **Prospects Stats**, in context with the amount of time left in the current year.
                1. In the example above, there is the potential to close eight Buyers Transactions by the end of the year. If a few months pass with no or few transaction closed, the number of potential transaction would decrease accordingly.
        - **Annual Sales Volume:** The potential Sales Volume for the year if the anticipated Transactions are closed.
3. **DETAILS:** The list of the details specific to the item you are viewing. In the example above, a completed Transaction is displayed (see above, highlighted in blue).
    a. **Pending:** In this example you are currently viewing all Buyers Transactions found in the Pending category. You can select Active, Prospects and Closed.
    b. **Listing:** The listing address for the selected transaction.
    c. **Size:** For this example, this is the purchase price or target price for the transaction.
    d. **Contact:** The person associated with this transaction.
        - **NOTE:** If there is no person here, go to the appropriate person's profile card and add the MLS number to their transaction. This will associate this transaction with your client.

Comparable Average

This category will display where you average in your office and MLS.



1. **CATEGORY:** Select the category you would like to view. In this example we are viewing **Comparable Average**.
2. **COMPARABLE AVERAGE:** The list and stats of your closed transactions, sorted by Me, My Office, and My MLS.
    a. **Me:** The list of all stats associated with your **Transactions Completed**. In this column, you can view:
        - **Transactions Completed:** Total transactions you closed.
        - **Average Transaction Size:** The average of purchased and sold prices.

    b. **My Office:** The list and stats of average transactions completed per agent in your office. In this column, you can view:
        - **Average Transactions Completed per Agent:** The average closed transactions per agent in your office.
        - **Average Transaction Size per Agent:** The average of purchased and sold prices per agent in your office.

    c. **All:** The list and stats of average transactions completed per agent in your MLS. In this column, you can view:
        - **Average Transactions Completed per Agent:** The average closed transactions per agent in your MLS.
        - **Average Transaction Size per Agent:** The average of purchased and sold prices per agent in your MLS.
3. **DETAILS:** The list of the details specific to the item you are viewing. In the example above, Transactions Completed is displayed (see above, highlighted in blue).
    a. **Listing:** The listing address for the selected transaction.
    b. **Size:** For this example, this is the purchase price or target price or the sold price for the selected transaction.
    c. **Contact:** The person associated with this transaction.
        - **NOTE:** If there is no person here, go to the appropriate person's profile card and add the MLS number to their transaction. This will associate this transaction with your client.