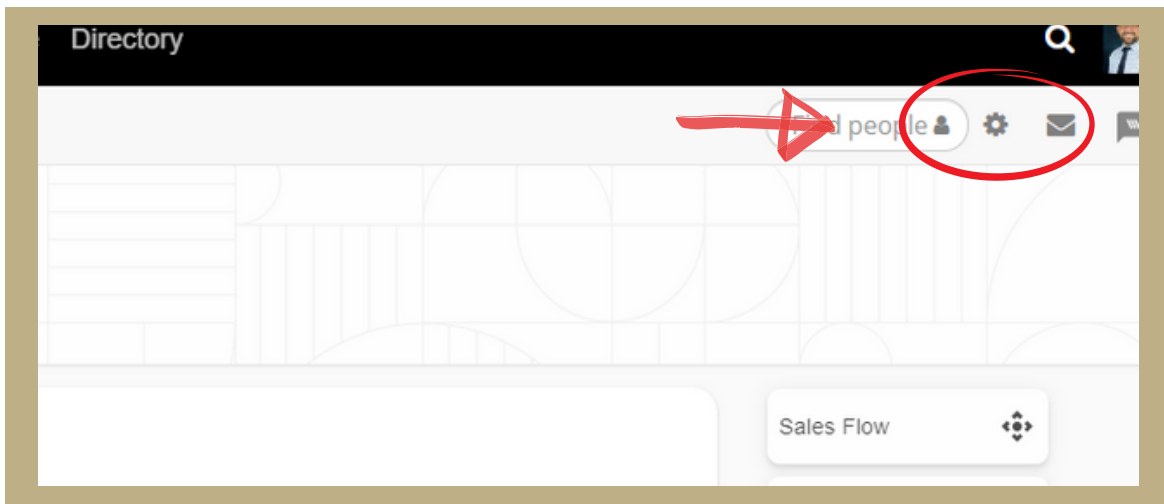




# Moxi Engage - How to update tasks in Sales Flow

The Quick Start Guide To change and update tasks and the flow.

- Log onto Moxi Engage..
- Click the Settings Icon on the right (next to the find people).



- Next, start typing person's name into the field. Once a name pops up, click on it.



- Here is a list of activities that fulfill Leads Engine engagement requirements. Definition of events from Moxi that trigger engagement in Leads Engine.
- 
- There are 4 event types that can fulfill LE lead engagement from within Moxi Engage:

**1 - Create Custom Activity from within the contact's profile (agent\_custom\_event\_)**

**2 - Email a presentation in PDF format from within Moxi Present**

**3 - Email a presentation slide from within Moxi Present**

**4 - Send an email to the contact from within Moxi Engage**

- In total, there are 11 different events, but the first 8 are created from the same form:

**1 - Create Custom Activity from within the contact's profile (agent\_custom\_event\_)**

**2 - Email a presentation in PDF format from within Moxi Present**

**3 - Email a presentation slide from within Moxi Present**

**4 - Send an email to the contact from within Moxi Engage**

**In total, there are 11 different events, but the first 8 are created from the same form:**

**1 - agent\_custom\_event\_social**

**2 - agent\_custom\_event\_other**

**3 - agent\_custom\_event\_text**

**4 - agent\_custom\_event\_phone**

**5 - agent\_custom\_event\_email**

**6 - agent\_custom\_event\_voicemail**

**7 - agent\_custom\_event\_inperson**

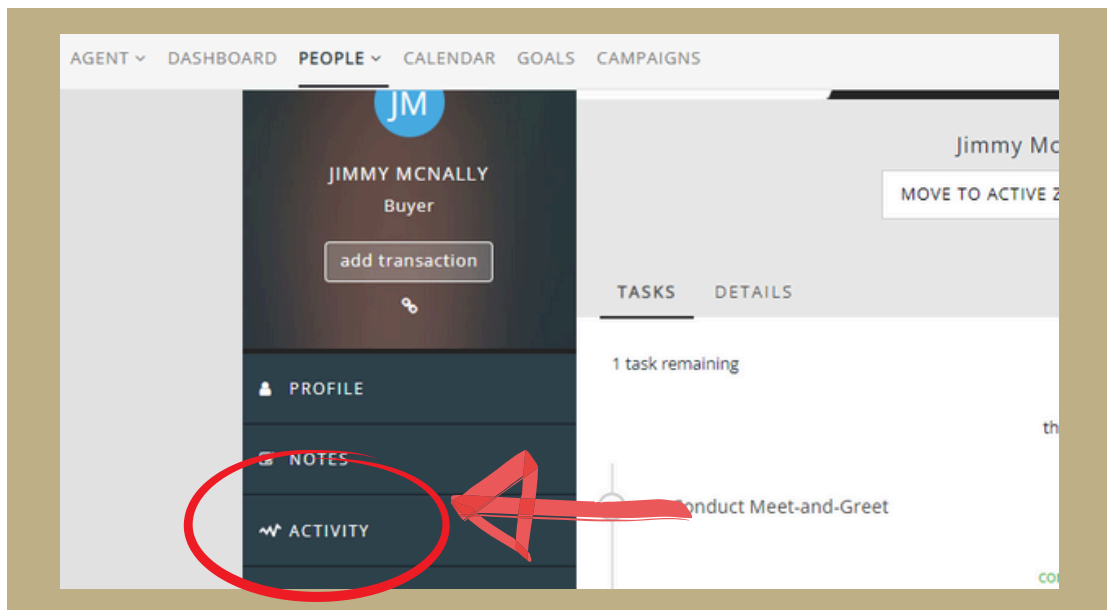
**8 - agent\_custom\_event\_mail**

**9 - pres\_pdf\_email**

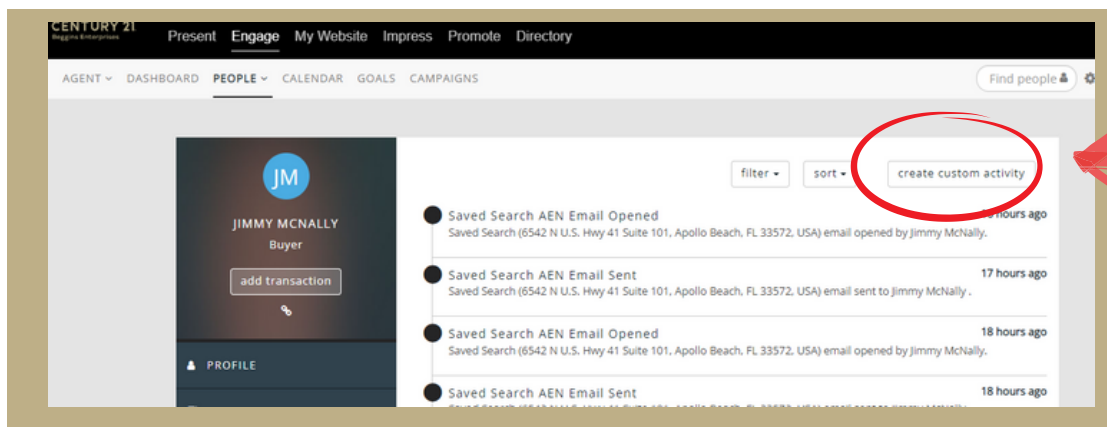
**10 - pres\_slide\_presentation\_email**

**11 - engage\_email\_sent**

- Next, scroll down until you see activity, and then click it.



- Next, Click create custom Activity.



- Next, choose the type of activity. This could be email, notes, calls, etc. Fill out the Description, date, etc.

The screenshot shows a CRM interface for JIMMY MCNALLY, Buyer. On the left is a sidebar with a profile icon (JM), name, and role, along with buttons for 'add transaction' and 'add note', and a list of tabs: PROFILE, NOTES, and ACTIVITY. The main area displays a form for adding a transaction. The form has a 'filter' dropdown, a 'create custom activity' button, and fields for 'Type' (set to 'Other'), 'Description' (with a text area containing 'Notes'), and 'Date' (set to '06/21/2022'). At the bottom of the form are 'DONE' and 'CANCEL' buttons. A red circle highlights the form fields, and a red arrow points to the 'add transaction' button in the sidebar. A status bar at the bottom shows 'Saved Search AEN Email Opened' and '16 hours ago'.

- Finally, Click done and you are good to go.

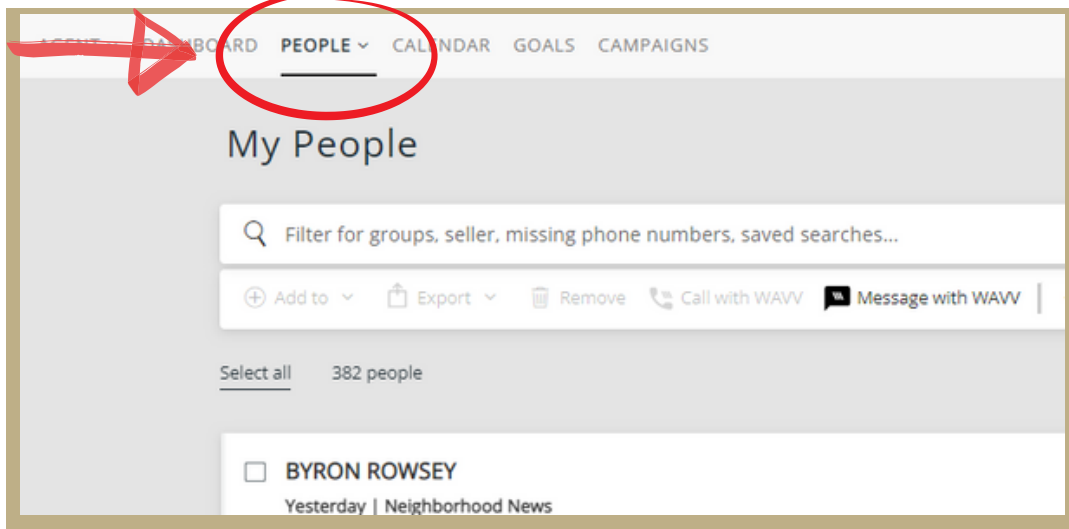
This is a close-up of the bottom portion of the CRM form. It shows the 'Type' field set to 'Other', the 'Description' field with the placeholder text 'Type notes here', and the 'Date' field set to '06/21/2022'. At the bottom are the 'DONE' and 'CANCEL' buttons. A red circle highlights the 'DONE' button, and a red arrow points to it from the left.



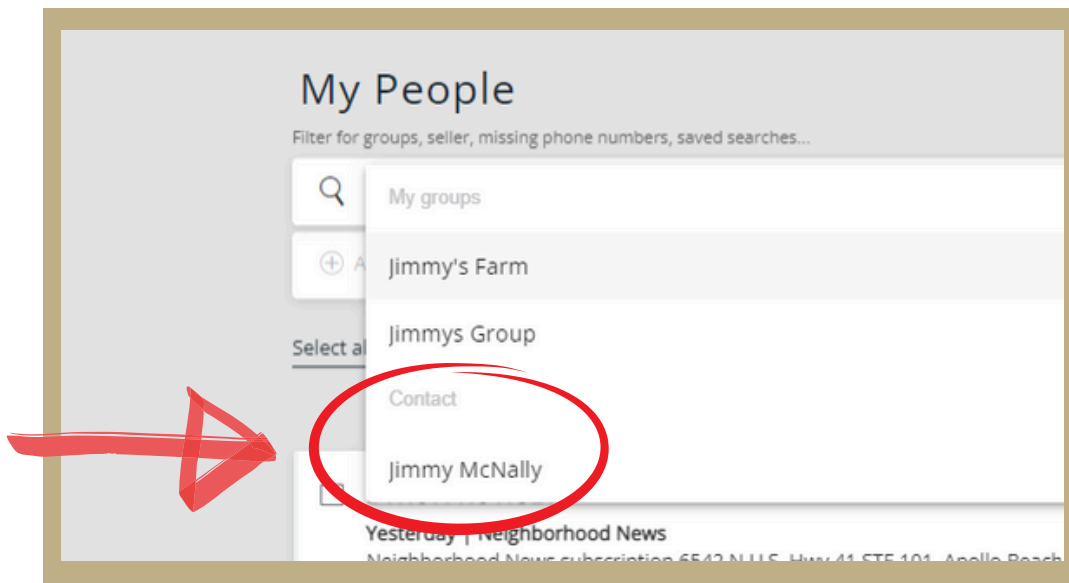
CENTURY 21. CENTURY 21. CENTURY 21.  
Beggins Enterprises BE3 LIST with BEGGINS

Empower. Educate. Encourage.

- Option 2
- Log In to Moxi Engage
- Click On the people tab, then click My people.
- 



- Next, Type in the persons name, email, or phone number in search. Once the name populates, click on in.



CENTURY 21. CENTURY 21. CENTURY 21.

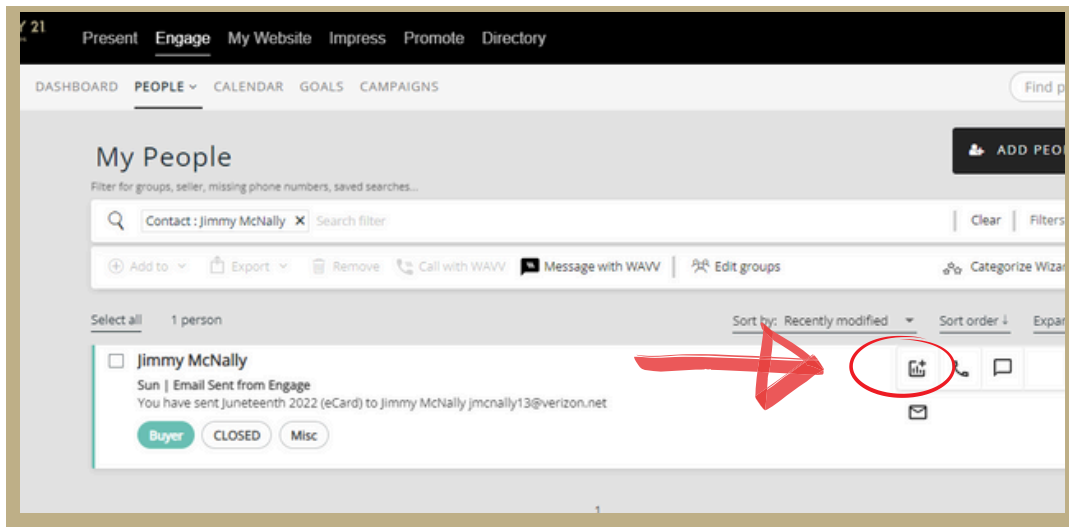
Beggins Enterprises

BE3

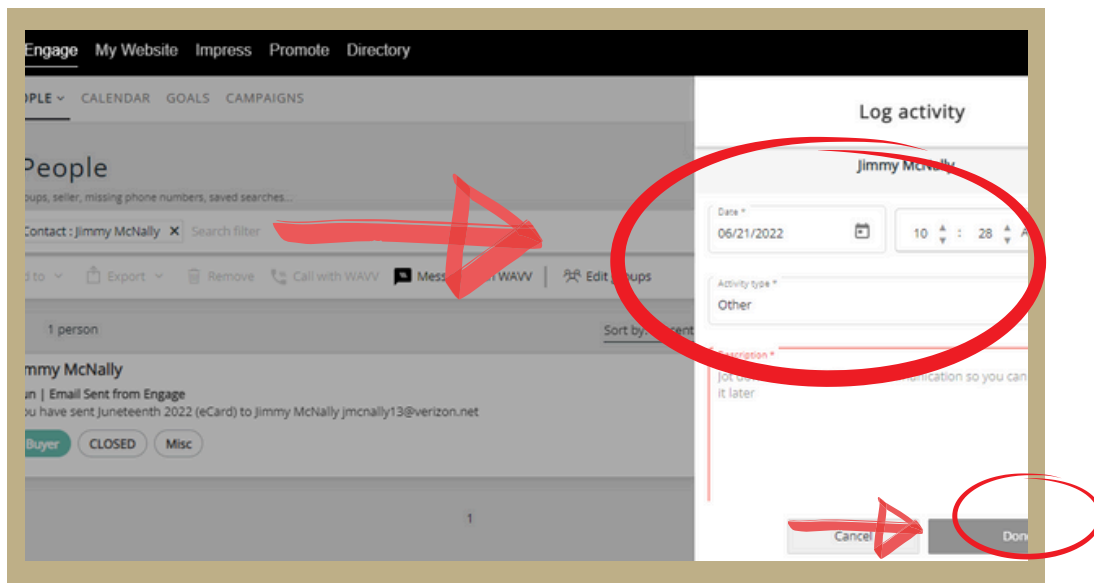
LIST with BEGGINS

Empower. Educate. Encourage.

- Next, when you see a person's name, click the first option on the right. This will pull up an activity option.
- 



- Next, fill out the activity and click done. You have now completed updating your lead.



**CENTURY 21. CENTURY 21. CENTURY 21.**  
Beggins Enterprises BE3 LIST with BEGGINS

**Empower. Educate. Encourage.**