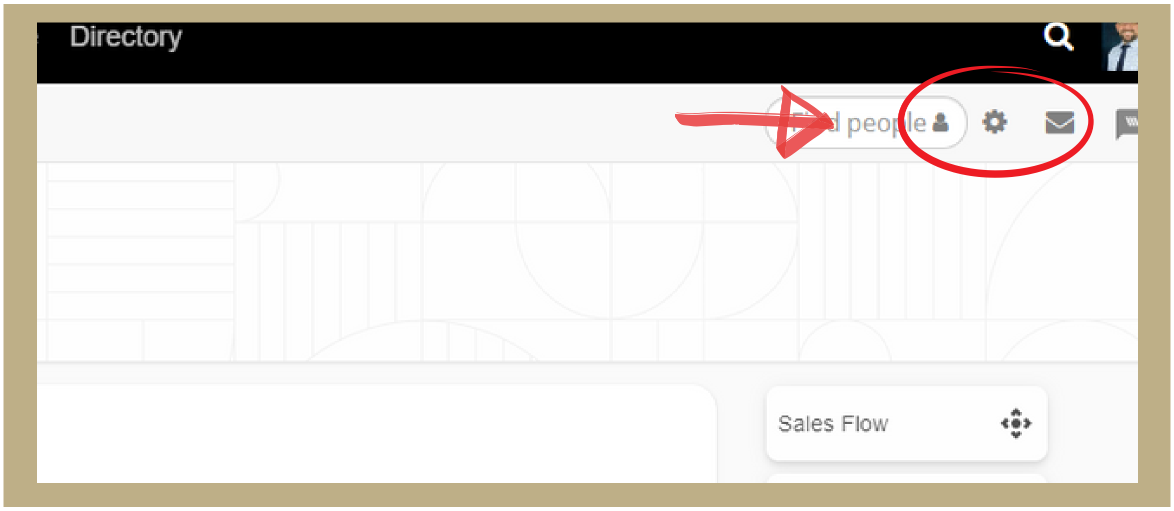
Moxi Engage - How to update tasks in Sales Flow

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.**
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- **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

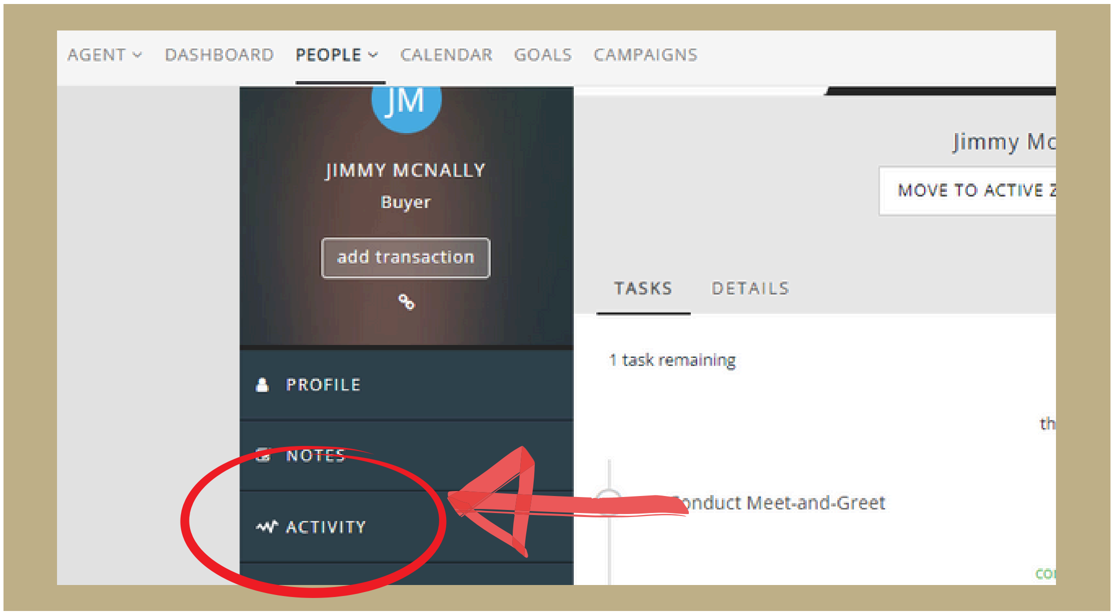
3 - Email a presentation slide from within Moxi Present

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

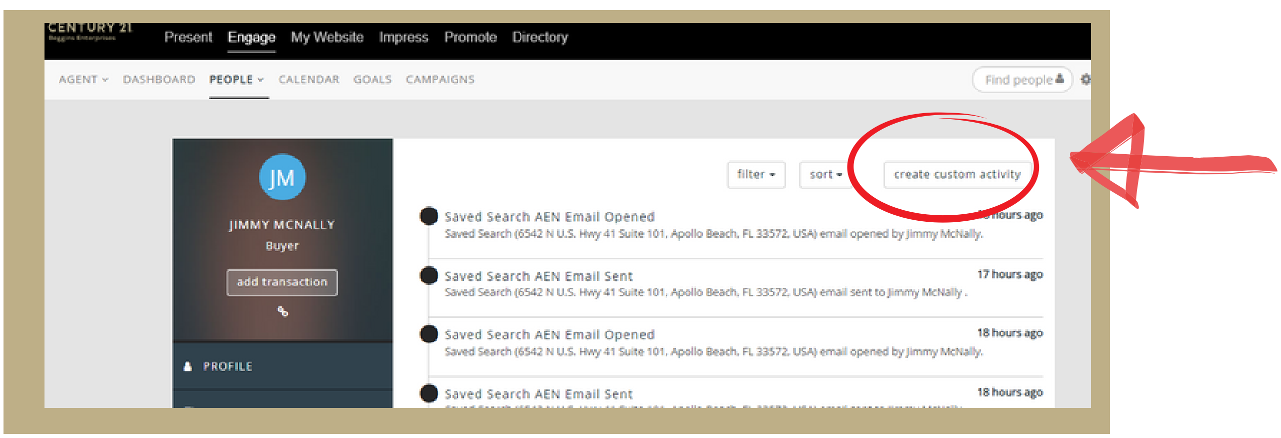
- **In total, there are 11 different events, but the first 8 are created from the same form:**

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_emailed
10 - pres_slide_presentation_emailed
11 - engage_email_sent

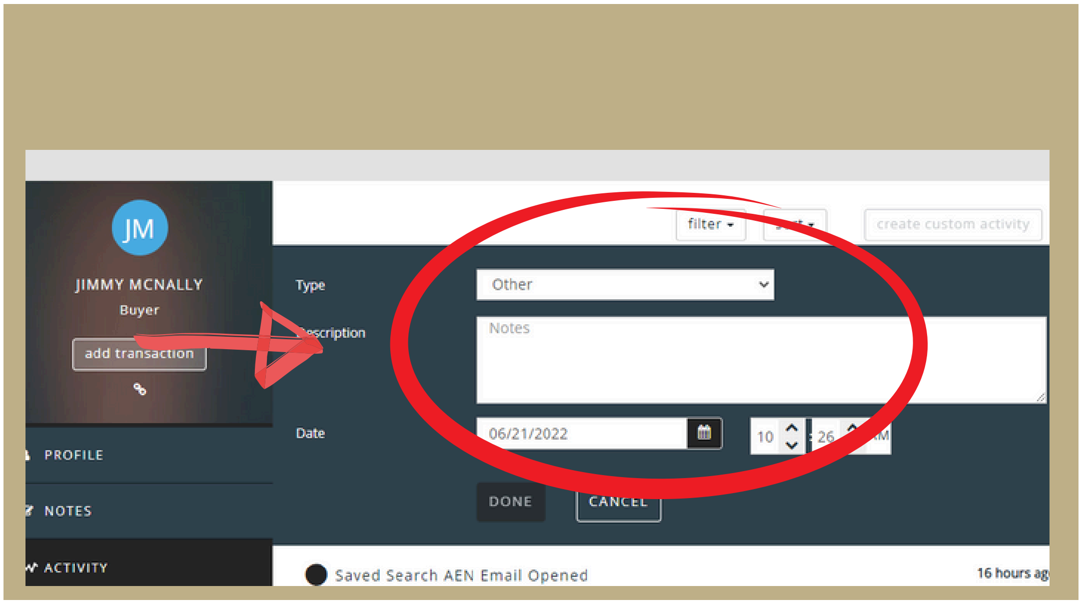
- Next, scroll down until you see activity, and then click it.



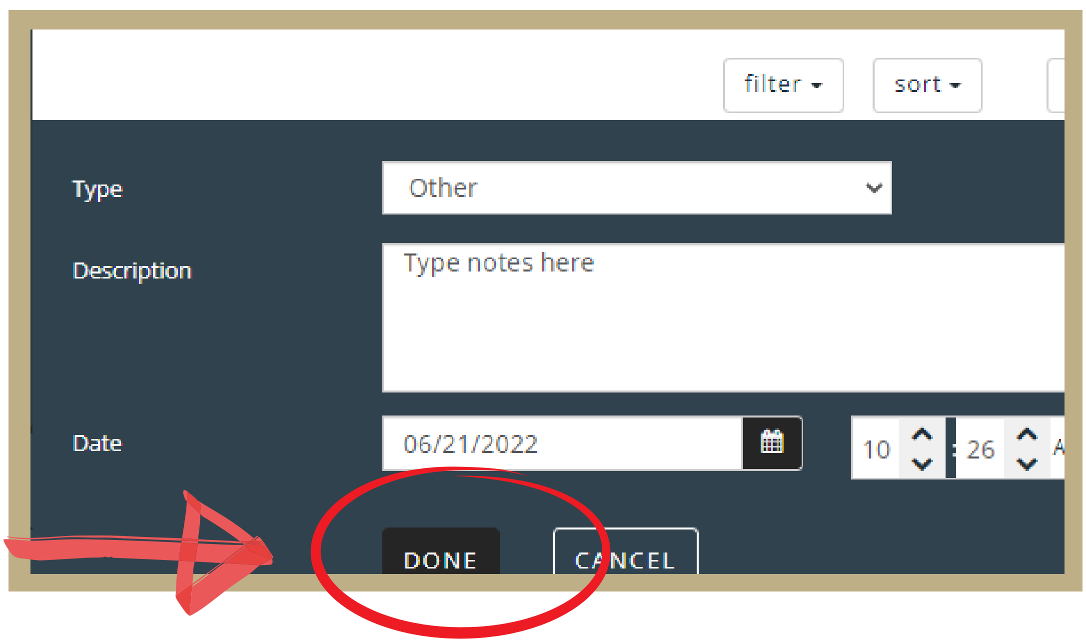
- Next, Click create custom Activity.



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



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



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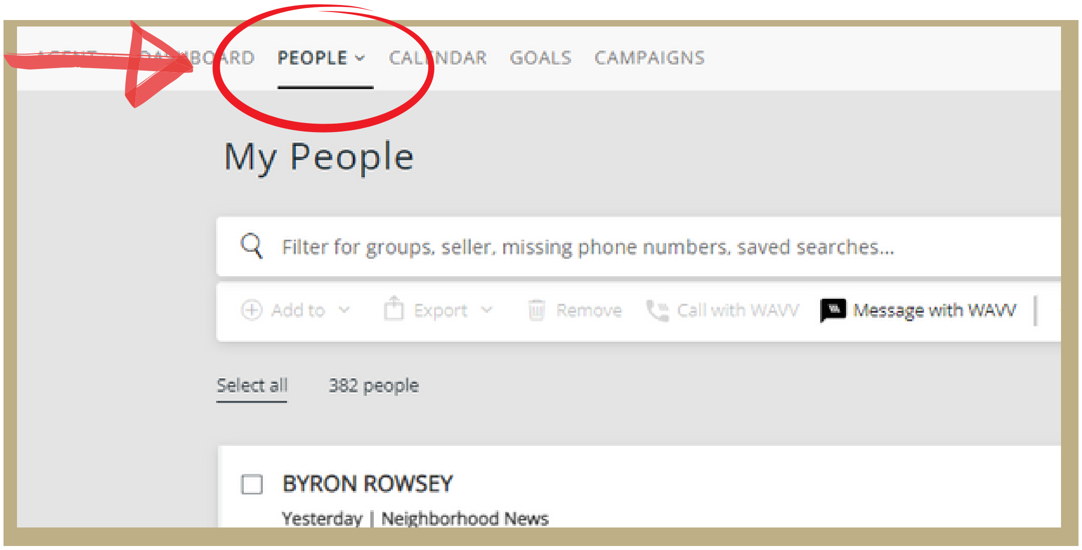
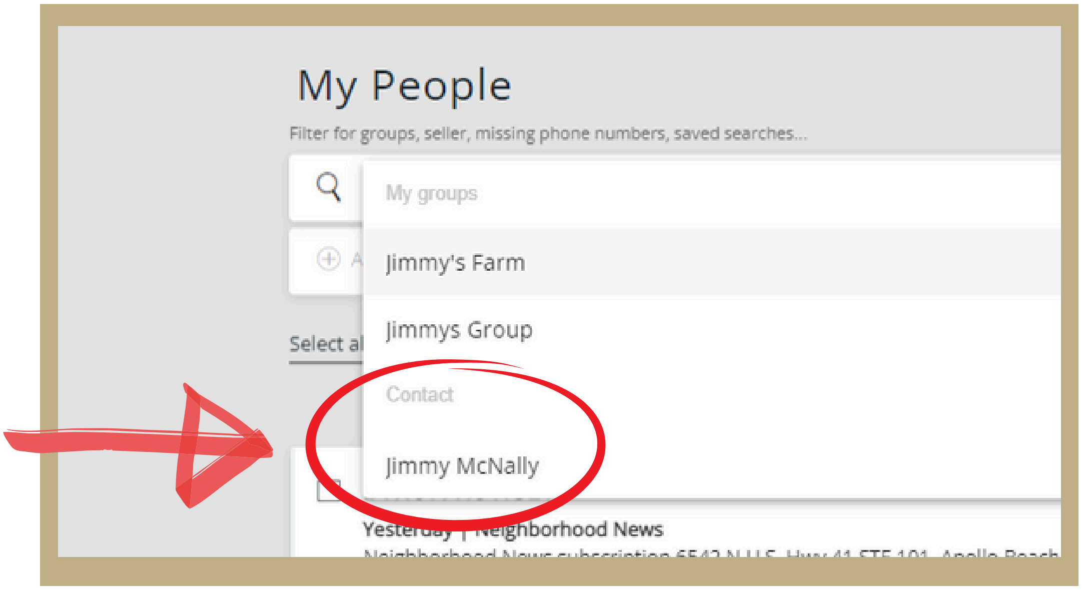


- Next, Type in the persons name, email, or phone number in search. Once the name populates, click on in.



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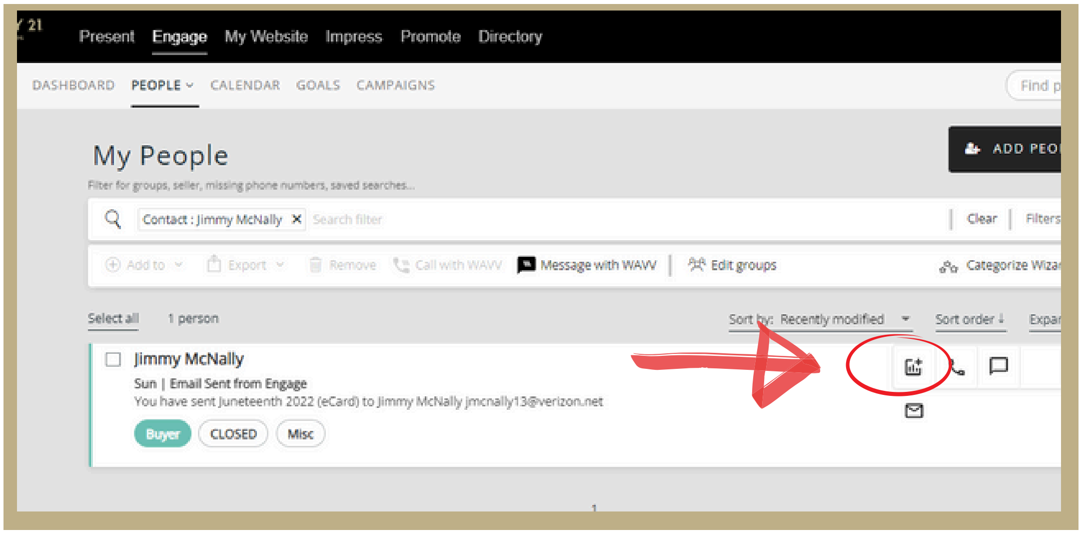

- Next, fill out the activity and click done. You have now completed updating your lead.