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## Setting up a team's Moxi homepage

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Sorry for the delay. I've been searching my email as I know I've typed this out so many times and like an idiot haven't saved it anywhere. So here we go!

### Moxi Team Websites:

Moxi accounts are fed from AccountTech to DASH, so each agent has an individual account. This is important to remember because it affects the email address and MLS ID used.

#### Option 1:

Both team members keep their correct agent name and information in Moxi and a Custom HomePage is created to show the Team information. One of the agent's accounts will have to be chosen to create this custom homepage from. Any leads or contact information coming from that site with the custom homepage will go to that chosen agent's Engage.

#### Option 2:

We rename the chosen main agent's account to be a team name in AccountTech. For Example: Carrie Skomp in AccountTech is renamed The Carrie Skomp Team. This flows through to Moxi and becomes the main name on the site. 2nd agent keeps his site as is, it can be hidden if they choose. Same scenario though, all leads will flow to the main agent account. Some teams pick a gmail account that they then forward to both members, but the leads only go into main agent's Engage.

I recommend Option 1. Cleaner with less room for error. Option 2 also affects how the main agent appears on ColdwellBanker.com, ColdwellBankerLuxury.com and CBCWorldwide.com. The Team name will show as their name.

Regardless of Option 1 or 2, the main agent account chosen will need to be turned into a team website. Here is some information on that.

#### Making a Team Website

<https://support.moxiworks.com/hc/en-us/articles/360038462931-Changing-Your-Agent-Website-to-an-Agent-Team-Website>

#### Adding Team Members to your Website

<https://support.moxiworks.com/hc/en-us/articles/207977446-Teams-Adding-Team-Members-to-your-Agent-Website>

In order for both of their listings and solds to be shown on the chosen agent website, Custom Property lists have to be created and added into the website via Site Pages.

### PRESENT:

Presentations can be shared among teammates.

#### Information on that:

<https://support.moxiworks.com/hc/en-us/articles/115005545846-Agent-Teams-How-to-Set-up-an-Agent-Team>

### ENGAGE:

You have the option to set up a team for Engage, but the only added benefit is the Team Lead can view the number of clients in the team members pipeline. For example, Team Lead can see that teammate has 5 in Marketing, 4 in Pending and 3 in Closed. The Team Lead can NOT view those actual clients names, accounts, etc.

The best work around is for each team member to give Delegated access to the other so they can share an Engage account. The From email and name will be from the chosen agent's account unless Option 2 above is chosen and then it will read as coming from the Team.

#### Information:

<https://support.moxiworks.com/hc/en-us/articles/115003150406-Roster-Account-Access-Other-Accounts>

Please give me a call to discuss. We like to start with finding out the Team objectives and then going from there. Thanks!



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