



EQUITABLE
ADVISORS

**Marketing
Suite**

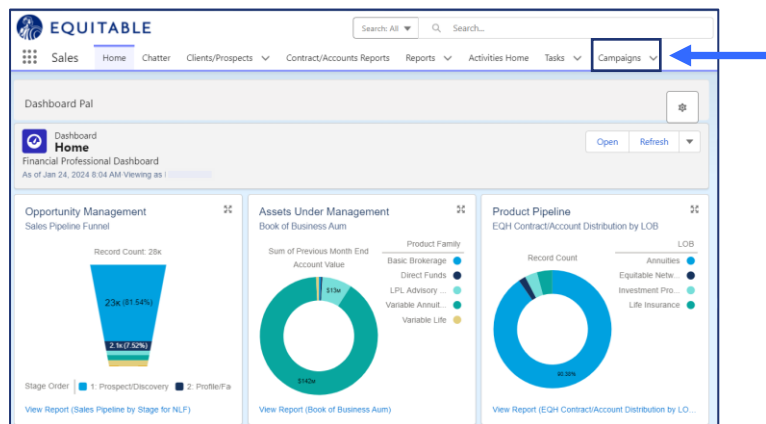
QRC – Salesforce Integration

Equitable Advisors Marketing Suite has a robust integration with Salesforce. This integration will allow you to effectively and efficiently use both platforms together to stay in touch with your Clients and Prospects.

Salesforce integration with Marketing Suite utilizes Campaigns to identify your targeted marketing audience.

Please note: You must create at least one campaign in Salesforce before syncing your contacts in Marketing Suite.

The Campaigns tab has been added as a default tab in Salesforce



The videos listed below provide details for each of the steps in the process. Please view these training videos (in order) to learn more about this integration .

1. Creating Campaigns - Manual Add
2. Creating Campaigns - Auto Refresh
3. Salesforce Sync - Initial, Update & Disconnect
4. Using Campaigns For a Mailing

READY TO LEARN MORE?

Visit our program microsite: www.equitable.fmgsuite.com

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