

QRC – Equitable Advisors Marketing Suite

Sent & Scheduled Emails – Email Overview

GENERAL OVERVIEW

The Sent & Scheduled Email functionality within Equitable Advisors Marketing Suite (Marketing Suite) has been updated to allow a user to search by a particular date range or add additional filters to the search query. This allows a user to more easily find details on a particular email or track open/click rates during a defined period.

SENT & SCHEDULED EMAILS

To review statistics for emails sent and scheduled in Marketing Suite, click on Email > Sent & Scheduled.

MARKETING TOOLS

- Content Library
- Website
- Blog
- Automated Marketing
- Email
 - Send Email
 - Your Email Templates
 - Sent & Scheduled**
 - Edit Email Design
- Social
- Events

SETTINGS

- Profile
- Contacts

EXTRAS

- Help

Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 50 email blasts out of 1954 total email blasts

Scheduled 0

Delivered Emails 50

Open Rate 56.0%

Click Rate --

Unsubscribe Rate --

Bounce Rate --

Search by Subject

MM/DD/YY - MM/DD/YY Subject Status

Send Date	Subject	Status	Sends	Opens	Clicks	Unsubs	Bounces	Actions
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	100%	0%	0%	0%	

A new Email Overview section will display that provides detailed totals for the results shown on **that page only**.

Record Count:

The default count is set to 50 records but can be changed to 20, 50, 100, or 200 by using the dropdowns. Totals displayed in the overview will adjust as you increase or decrease the dropdown.

In this example the record count was changed to 200 and the totals adjusted accordingly.



MARKETING TOOLS

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- Email

Send Email

Your Email Templates

- Sent & Scheduled
- Edit Email Design

Social

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Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 200 email blasts out of 1954 total email blasts

Scheduled
0

Delivered Emails
2,017

Open Rate
52.8%

Unsubscribe Rate
--

Click Rate
4.1%

Bounce Rate
0.4%

Search by Subject

MM/DD/YY - MM/DD/YY Subject Status

Send Date	Subject	Status	Sends	Opens	Clicks	Unsubs	Bounces	Actions
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	
07/24/2024	Happy Birthday!	Sent	1	0%	0%	0%	0%	

Search by Subject:

To narrow results, you can search by subject. This will display results for all emails containing that search term in the email subject line. An example is shown below. Search criteria is not case sensitive.

MARKETING TOOLS

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- Automated Marketing
- Email

Send Email

Your Email Templates

- Sent & Scheduled
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Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 200 email blasts out of 6 total email blasts

Scheduled
0

Delivered Emails
16,689

Open Rate
59.5%

Unsubscribe Rate
0.1%

Click Rate
6.1%

Bounce Rate
0.2%

checklist Search

MM/DD/YY - MM/DD/YY Subject Status

Send Date	Subject	Status	Sends	Opens	Clicks	Unsubs	Bounces	Actions
07/01/2024	REMINDER - Please complete Rev...	Sent	1,818	52%	4.6%	0%	0.5%	Duplicate
06/10/2024	Response requested - Review Che...	Sent	3,332	61.3%	10.6%	0.1%	0%	Duplicate
06/03/2024	Review checklist coming soon	Sent	3,351	56.4%	0.3%	0.1%	0.3%	Duplicate
01/22/2024	REMINDER - Please complete Rev...	Sent	1,383	51.8%	3.8%	0%	0.1%	Duplicate
01/08/2024	Response requested - Review Che...	Sent	3,406	64.9%	15%	0.1%	0.2%	Duplicate
01/04/2024	Review checklist coming soon	Sent	3,399	62.3%	0.4%	0.1%	0%	Duplicate

Search by Date:

Use the date picker fields to search for emails sent in a defined period or utilize the predefined options for:



- This week
- Last week
- Last month
- Current month
- Next month

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Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 200 email blasts out of 291 total email blasts

Scheduled
0

Delivered Emails
3,531

Open Rate
61.3%

Unsubscribe Rate
0.1%

Click Rate
10.0%

Bounce Rate
0.1%

Search by Subject

06/01/24 - 06/30/24

Subject Status Reset filters

This week June 2024

Last week

Last month

Current month

Next month

Reset

Sends	Opens	Clicks	Unsubs	Bounces	Actions
1	100%	0%	0%	0%	
1	100%	0%	0%	0%	
1	100%	0%	0%	0%	
1	100%	0%	0%	0%	
1	100%	0%	0%	0%	
1	0%	0%	0%	0%	

Additional Subject Search Functionality:

You can also use the Subject Search to Exclude results containing a search term by using a "Does not contain" search. In the example below by entering a search of "does not contain birthday", all emails sent via the birthday email marketing automation are excluded from the page totals.



Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 200 email blasts out of 16 total email blasts

Scheduled
0

Delivered Emails
39,818

Open Rate
58.7%

Unsubscribe Rate
0.2%

Click Rate
2.8%

Bounce Rate
0.7%

Search by Subject Search

MM/DD/YY - MM/DD/YY Subject Status Reset filters

Send Date	Subject	Status	Opens	Clicks	Unsubs	Bounces	Actions	
07/01/2024	REMINDER - Phase	Does not con... birthday	1,818	52%	4.6%	0%	0.5%	Duplicate
06/10/2024	Response requests - Review soon	Sent	3,332	61.3%	10.6%	0.1%	0%	Duplicate
06/03/2024	Review checklist coming soon	Sent	3,351	56.4%	0.3%	0.1%	0.3%	Duplicate
05/15/2024	Your Equitable accounts: help us k...	Sent	3,359	61%	0.3%	0.1%	0.4%	Duplicate
05/02/2024	Secure Your Loved Ones' Future wi...	Sent	3,364	51.7%	0.3%	0.1%	0.5%	Duplicate
03/21/2024	Spring Break: Assess Your Finances!	Sent	1,573	48.7%	0.3%	0%	0.1%	Duplicate

Search by Status:

This allows you to search by email status. Available values are:

- Expired
- Scheduled
- Sent

Sent & Scheduled

Find everything you need for your email campaigns in one place, saving you time and keeping you organized.

Email Overview

Showing data for 50 email blasts out of 3 total email blasts

Scheduled
3

Delivered Emails
0

Open Rate
--

Unsubscribe Rate
--

Click Rate
--

Bounce Rate
--

Search by Subject Search

MM/DD/YY - MM/DD/YY Subject Status Reset filters

Send Date	Subject	Status	Opens	Clicks	Unsubs	Bounces	Actions
09/28/2024	Your annual review is coming up	Scheduled	-	-	-	-	Duplicate Edit
09/02/2024	Happy Labor Day!	Scheduled	-	-	-	-	Duplicate Edit
07/26/2024	iPhone Economics	Scheduled	-	-	-	-	Duplicate Edit



EQUITABLE
ADVISORS

**Marketing
Suite**

READY TO LEARN MORE?

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- Contact Support: Equitable@fmgsuite.com or (858) 500-5479
- Contact MarTech Project Team: AdvisorMartech@Equitable.com