

QRC – Equitable Advisors Marketing Suite

Mobile Application

FMG App iOS Download and Install Guide



GENERAL OVERVIEW

Equitable Advisors Marketing Suite (Marketing Suite) allows users to download the FMG mobile app from the App Store. The app allows you to send emails and publish social content to business social media accounts connected to Marketing Suite & Proofpoint Patrol. This document outlines general information, instructions to download and log into this application and how to utilize the features of the mobile app.

Please note these important considerations before downloading the app.

- The FMG app allows limited functionality as described below. If you prefer a full desktop experience on a mobile device, Marketing Suite has been enabled on the Advisors Mobile Portal (AMP) application (available in the Company Portal) and is available on your Intune protected tablet or mobile device.
- Currently, the application is not available to administrative staff members. If your admin requires mobile access, we suggest installing the AMP application.
- If you have more than one subscriber account in Marketing Suite, you will need to designate one account as a default before downloading the application. Please reach out to if issues encountered.

The FMG Mobile App makes it easy to discover and share timely content to your established groups or connected social media accounts. The App has a user-friendly interface, and you can share an email or social post in less than a minute!

Application highlights include:

- Timely content feed
- Seasonal and Holiday content
- Push notifications for newly posted content
- Marketing Calendar

The following desktop-only functionality is **not** available on the App:

- Adding/Updating contacts (including syncing with a CRM)
- Adding new social integrations
- Completing website/profile setup
- Activating/Pausing Automated Marketing Campaigns
- Sending a “preview” email
- Sending emails to individual contacts
- Canceling scheduled emails or social posts
- Editing scheduled emails or social posts

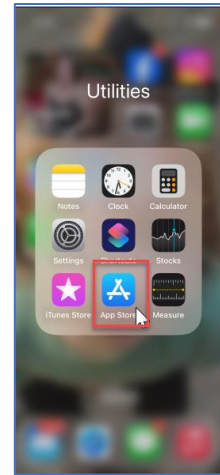


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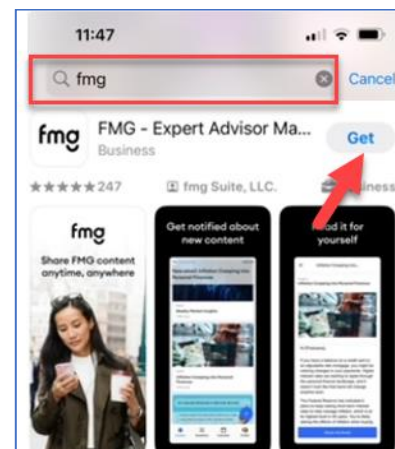
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INSTALL APPLICATION

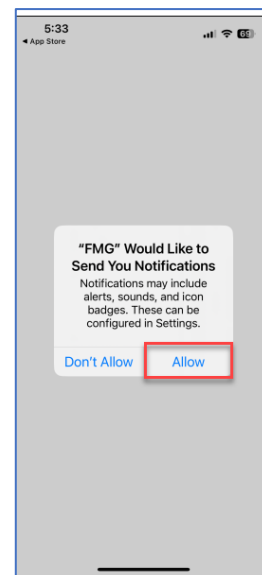
1. Please login to your Intune connected mobile device, navigate to the **App Store** and search for FMG. Select the application **FMG – Expert Advisor Marketing**.



2. Click the **Get** icon to download the application.



3. When prompted, select **Allow** for FMG to send notifications.





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4. You will be presented with an FMG log in screen. Please enter your **primary email address** (e.g. john.doe@equitable.com or john.doe@dba.com) and select **Next**

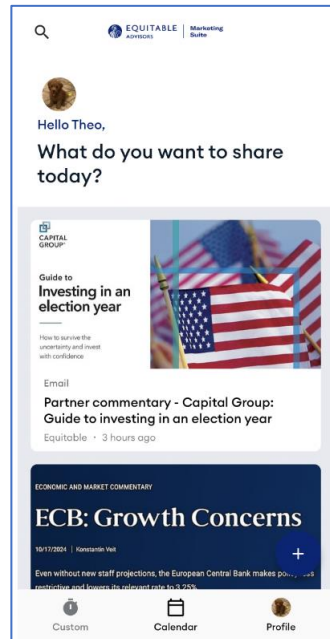
5. On the Equitable.com login screen, enter your normal **User ID and Password** and select **Sign In**.

NOTE: You may be presented with a **DUO** authentication request, please **Approve** to proceed.

NOTE: If presented with a Terms of Service message, **Check** the agreement box, and select **Accept**.



6. The mobile home page of the application will display:

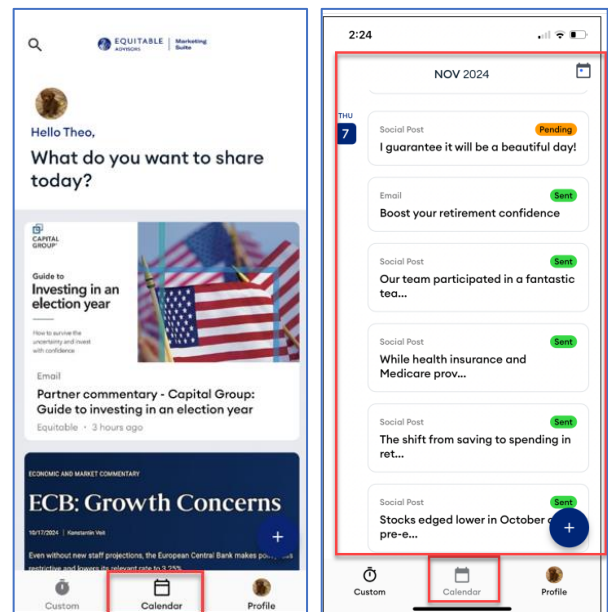


7. The install is complete!

MOBILE APPLICATION FUNCTIONALITY

CALENDAR:

On the bottom Toolbar you can navigate to the **Calendar** tab. You can see upcoming scheduled content from within the **'Marketing Calendar.'** Within this view you will see scheduled emails, automations, as well as social posts.



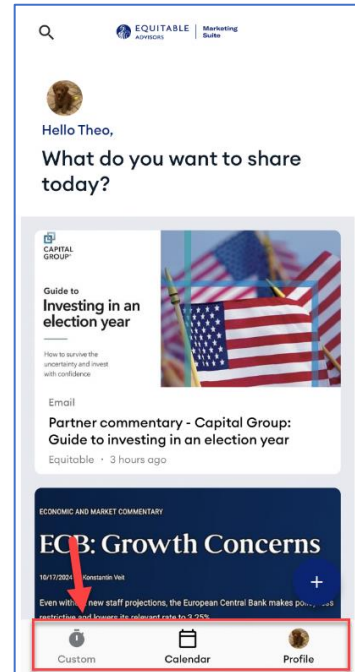


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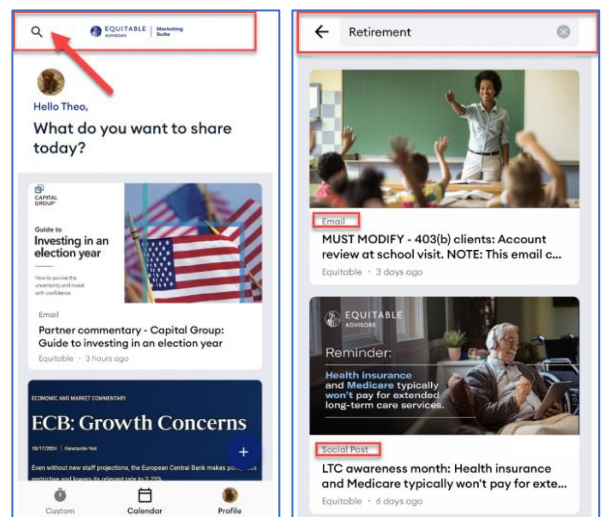
SEARCH FOR CONTENT:

Search for email or social content by scrolling through the home page where recent, relevant content will display.



OR

Select the **Magnifying Glass icon** to search by a keyword for pre approved **Email** or **Social Media content**. Once you have selected a piece of content you wish to share, please follow the steps below.



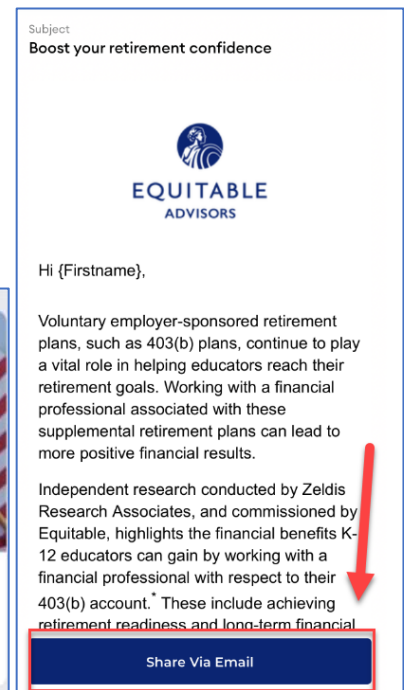


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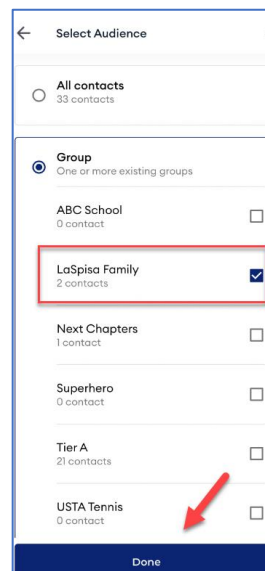
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SHARE PRE-APPROVED EMAIL CONTENT

1. Select and preview the email you wish to share.
Select **Share Via Email**



2. Select Audience. Please note the default recipient is "All Contacts". Choose the specific **Group(s)** and select **Done**.



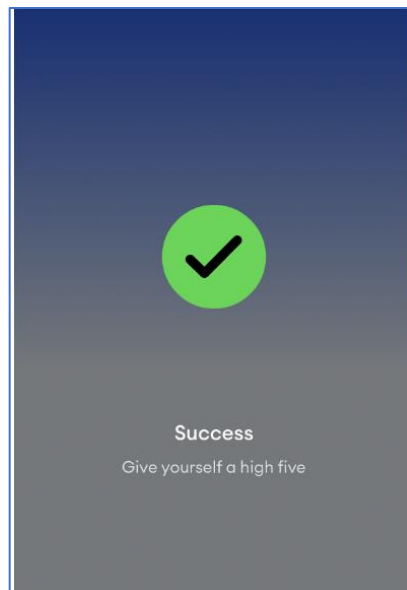
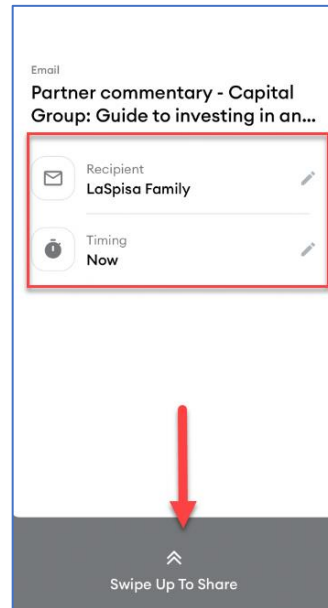


3. You have the option to select the **Pencil Icon** to edit your Recipient Group(s) and select **Timing** of send.

NOTE: *Timing will default to Now but you have the option to choose a later date and time.*

Once you have confirmed those details **Swipe Up to Share**

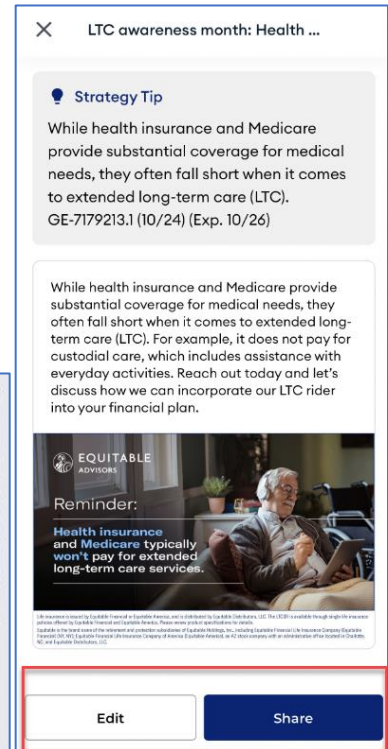
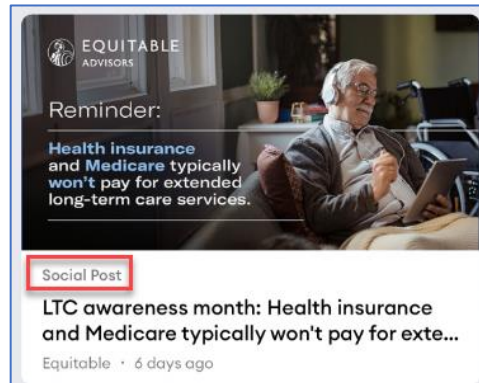
4. Once your email is sent you will receive this confirmation





SHARE PRE-APPROVED SOCIAL MEDIA CONTENT

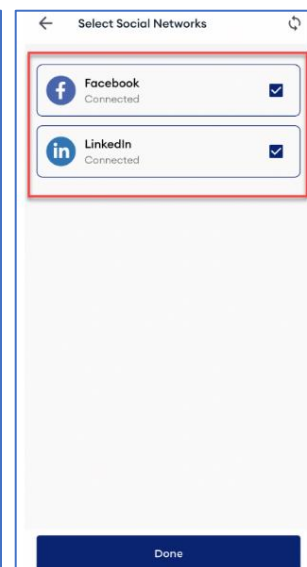
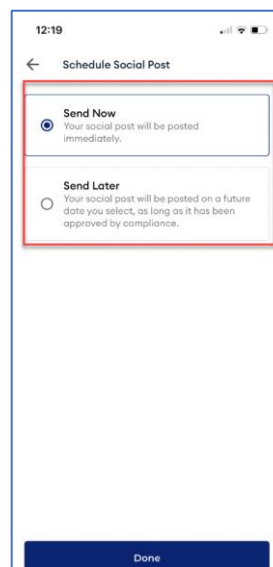
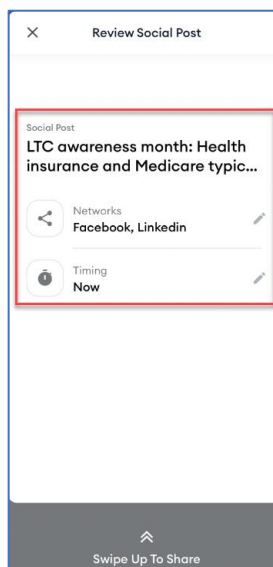
1. Preview the social media post you wish to share. Once viewed, you have the option to Edit (which will require Advertising Compliance review) or select **Share**



2. Select the **Pencil Icon** to choose which connected social media networks to share to and select your **Scheduled** send time.

NOTE: Schedule send will default to Now but you can choose a later date and time.

Once you have confirmed those details **Swipe Up to Share**

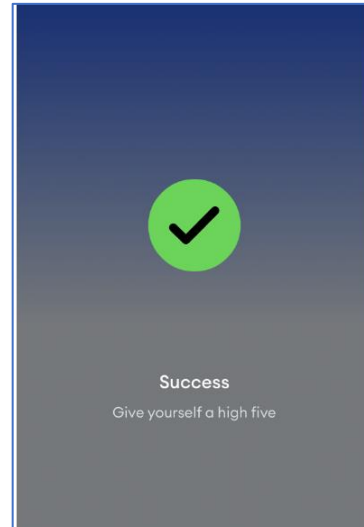




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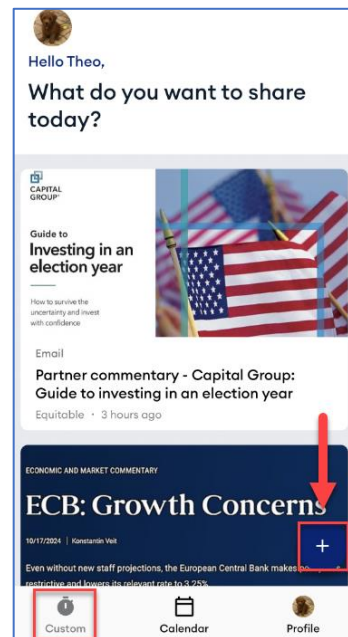
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3. Once your email is sent you this confirmation will be displayed



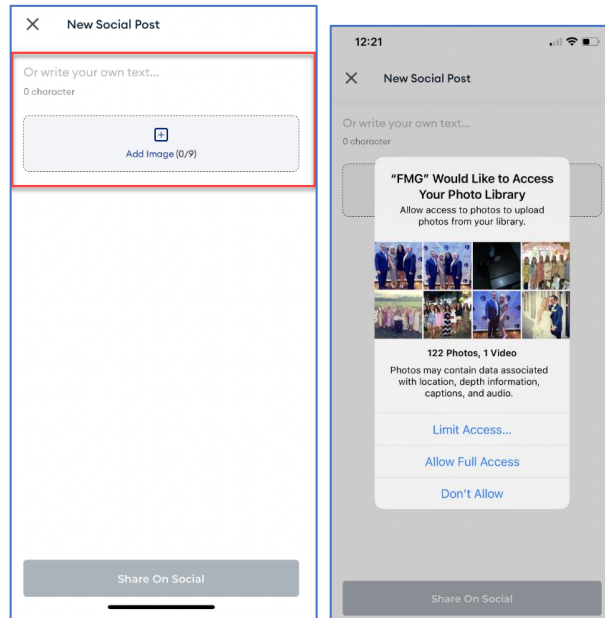
CREATE CUSTOM SOCIAL MEDIA CONTENT

1. Select the + on the bottom right to create Custom Social Media Content

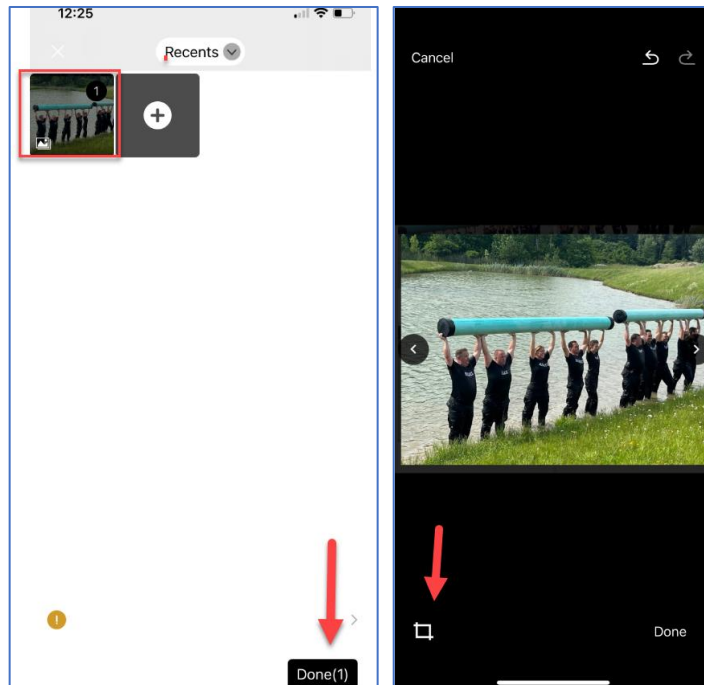




2. You have the ability to compose your own text and add up to 9 images for your custom social media post. You can select the + to add images which pulls from images on your mobile device.

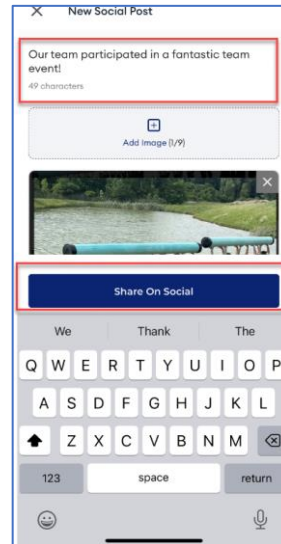


3. Select your image(s). You also have the ability to **crop** your images if needed. Once you are finished selecting your image(s) click **Done**.



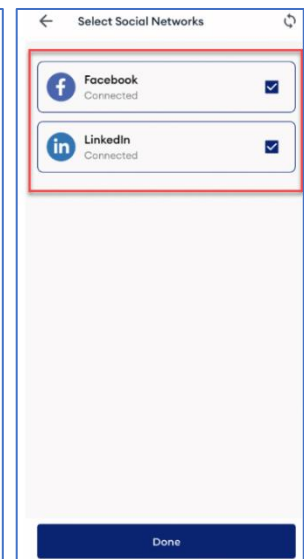
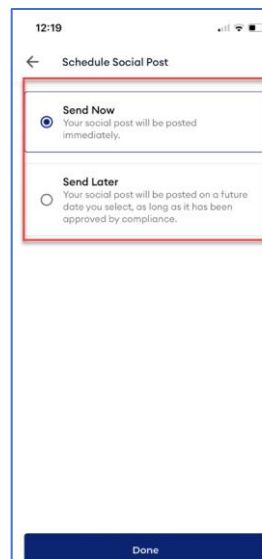
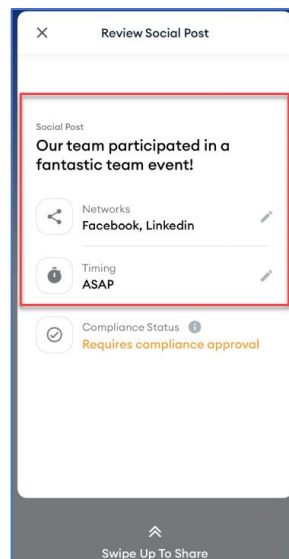


- Once you have composed your message and added any optional image(s) select **Share on Social**

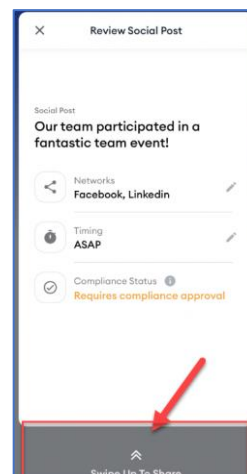


- Select the **Pencil Icon** to choose which connected social media networks to share to and select your **Scheduled** send time.

NOTE: Schedule send will default to Now but you can choose a later date and time.



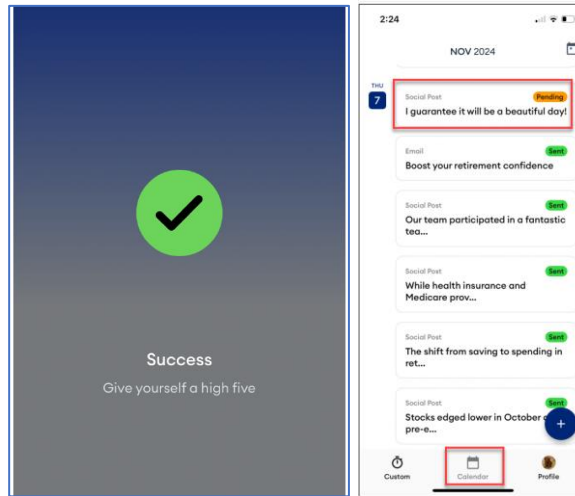
- Once you have confirmed those details **Swipe Up to Share**





7. A confirmation will be displayed.

NOTE: The post will automatically be published to the selected social media accounts if it does not contain flagged keyword(s). If the post contains flagged keyword(s), it will route to home office Advertising Compliance for review. You can navigate back to the **Calendar** tab to view the status.



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- Visit our program microsite: <https://micro.fmgsuite.com/equitable/>
- Contact Support: Equitable@fmgsuite.com or (858) 500-5479
- Contact MarTech Project Team: AdvisorMartech@Equitable.com