



Introduction

Salesforce integration with Marketing Suite requires:

- Creation of a campaign in Salesforce.
- Contacts added to that campaign can then be synced to Marketing Suite.

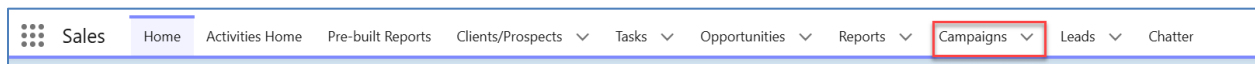
Salesforce allows for Auto Update campaigns which will automatically add/remove contacts based on a set of predefined filter criteria each night.

New functionality has been enabled to add Contract/Account information to the eligible campaign filters for auto updating campaigns. This provides greater flexibility in targeting contacts for email marketing purposes. (see Step 7 below).

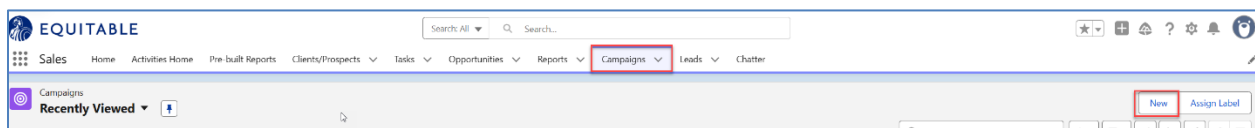
Please follow the instructions below on how to create Auto Update Campaigns and set filters.

Creating Auto Update Campaigns

1. To create a new Campaign, navigate to the Campaigns tab in the top navigation bar.



2. Click New.



3. Enter a Campaign Name and ensure that "Auto Updating" is checked. Click Save.

Auto Update Campaigns - Salesforce

4. At the bottom of the Campaign page, filters can be selected to create the group of contacts this campaign will use. Clicking **Next** will add all eligible Clients/Prospects, etc. to the Campaign. **Show Advanced Filters** will open the filter options for the Campaign which can be specified.

Auto Update Email Campaigns

Filter Confirm Activate

Step 1

If no additional filters are selected, all eligible Client/Prospects (including Former Clients, personal, other and third party will be selected).

Next

Show Advanced Filters

5. Clicking **Show Advanced Filters** will open the Filter Criteria screen to select specific filters. Contacts can be filtered by either Client/Prospect specific data or data based on what Contract/Accounts the contact may own. The two types of filters can be used individually or together.

Auto Update Email Campaigns

Filter Confirm Activate

Step 1

Client/Prospect Filters Contract/Account Filters

If no additional filters are selected, all eligible Client/Prospects (including Former Clients, personal, other and third party will be selected).

Filter Criteria

Match every filter (And)

> Type

> Age/DoB

> Profile - Text

> Profile - Options

> Profile - Date

> Dynamic Date Range

> Location

Next

Auto Update Campaigns - Salesforce

6. Client/Prospect filters allow you to filter on any field specific to the person themselves. These fields are grouped into different sections based on field types. Multiple selections can be made in columns or for text fields, multiple options can be entered separated by a comma.

7. **NEW:** Contract/Account filters allow for specifying any contacts who own these types of products. If the Contract/Account is Joint owned, this will include all Owners. Client/Prospect Filters and Contract/Account Filters are separated into different sections based on field types.

Auto Update Campaigns - Salesforce

Preset Product Type filters have been created to select specific product groups making it easier to select the contacts who own those products you want included in the campaign. Preset Product Type filters can be multi-selected by moving the product(s) you want included to the Selected column on the right by using the right arrow.

✓ Preset Product Types

Preset Product Type (Available)

- Proprietary Life Insurance
- Proprietary Annuity
- All Investment Products (LPL and Cash Solicitor)
- All LPL Advisory
- Equivest TSA
- Equivest TSA/EDC

Preset Product Type (Selected)

Preset Product Type Filters:

- Proprietary Life Insurance
- Proprietary Annuity
- All Investment Products (LPL and Cash Solicitor)
- All LPL Advisory
- Equivest TSA
- Equivest TSA/EDC
- Proprietary Term Life Insurance
- Proprietary Variable/Universal Life Insurance
- EQN Life Insurance
- EQN Annuity

8. Once all filters are selected, click **Next**. This will provide a total number of Clients/Prospects that meet the selected criteria. This also includes a list of eligibility criteria the contacts must meet, and a recap of what filters were selected.

Auto Update Email Campaigns

✓ Confirm Activate

Step 2

3153 contacts were found

If you are not a listed Service Agent for the Client nor Owner of the Prospect, or if we are not permitted to email a particular client in this list, we will not add them to the campaign. The following is a sample of eligible clients for the selected filter criteria.

Eligible Clients/Prospects:

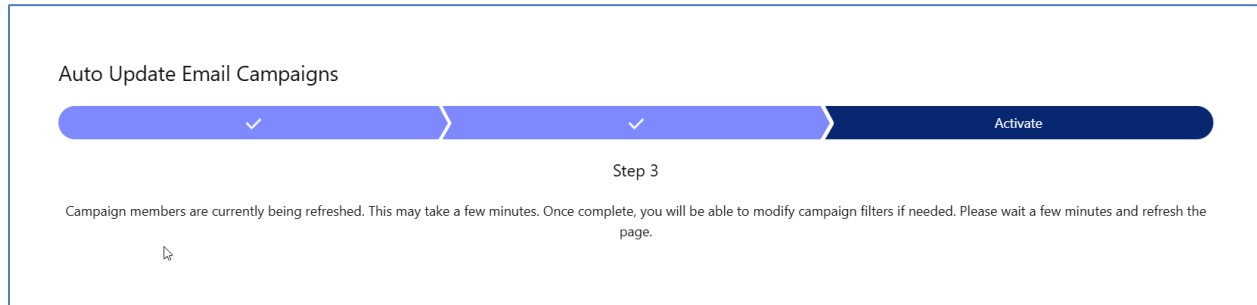
- Clients: Must be the Service Agent on at least one active Contract.
- Former Clients: Must be the Service Agent on at least one contract.
- Prospects, Other, Person, 3rd Party Clients: Must be the Owner of the record.
- Email Opt Out is not selected.
- Client Status is not Deceased.
- Has a primary email address or complete home address.
- Account Record Type equals 1, Individual.

Filter Criteria:

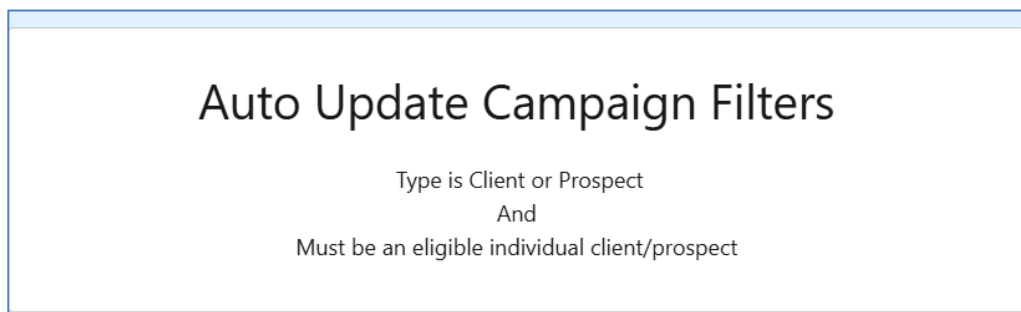
- Type is Client or Prospect
- And
- Must be an eligible individual client/prospect

Auto Update Campaigns - Salesforce

9. If all looks correct, click **Next**. This will begin the process to load those contacts that meet the filter and eligibility criteria to the Campaign.

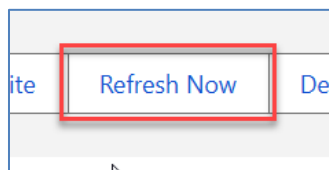


10. The current selected filters are displayed on the right side of the campaign. To update these filters, complete the filter selection process at the bottom of the screen again.



Managing Auto Update Campaigns

- Auto Update Campaigns will refresh each night after Midnight. This will add in any new Client/Prospects that now meet the criteria and will remove any existing Campaign members who no longer meet the criteria.
- If you make changes to a Client/Prospect today and do not want to wait for the overnight refresh, select the **Refresh Now** button. This will update the Campaign members in real-time. For instance, if you have a Campaign set to include all Tier A Clients and you update a new Client to Tier A today, select the **Refresh Now** button to have the Campaign re-analyze which contacts meet the criteria. That new Tier A record would now be added to the Campaign as they now meet the defined filter criteria.



Auto Update Campaigns - Salesforce

- To check if a contact is in the Campaign or determine why a contact is not included, use the Verify Campaign Member Eligibility widget on the Campaign. Here you can search for the Client/Prospect, and the widget will provide information about whether or not the contact can be added to the Campaign.

Verify Campaign Member Eligibility ⓘ

Use this search utility to verify if a Client/Prospect record is eligible for this campaign.

Maureen O'Malley

×

Maureen O'Malley does not meet the filter criteria for this auto updating campaign.

- Users can check which Campaigns a Client/Prospect is a part of by using the **Email Marketing** Button in the top right of the Client/Prospect page. This will also identify if those Campaigns are Auto Updating.

ClientProfile STP

Email Marketing

Create Action Plan

▼

Email Marketing

Current Campaign Membership		
Campaign Name	Date Added	Auto Updating
Test Campaign	Aug 12, 2025	Yes
All Client Birthdays	Jun 3, 2024	Yes

Additional Resources

Microsite: <https://micro.fmgsuite.com/equitable/>

Resource page: <https://micro.fmgsuite.com/equitable/resources/>