

QRC – Equitable Advisors Marketing Suite

Change User Role – Setting Delegate User Permissions

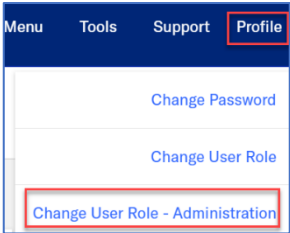
GENERAL OVERVIEW

Equitable Advisors Marketing Suite (Marketing Suite) is an available application on the Change User Role (CUR) platform on Equitable.com. CUR allows a properly permissioned user (impersonator) to act on behalf of the Financial Professional(s) they support in a compliant way. Setting up access via CUR provides full functionality to CUR users within each Marketing Suite account that the FP owns. Should the FP wish to define permissions more discretely, additional functionality is available within Marketing Suite to further define access levels. The functionality for an FP to modify platform level access for CUR users is outlined in this document.

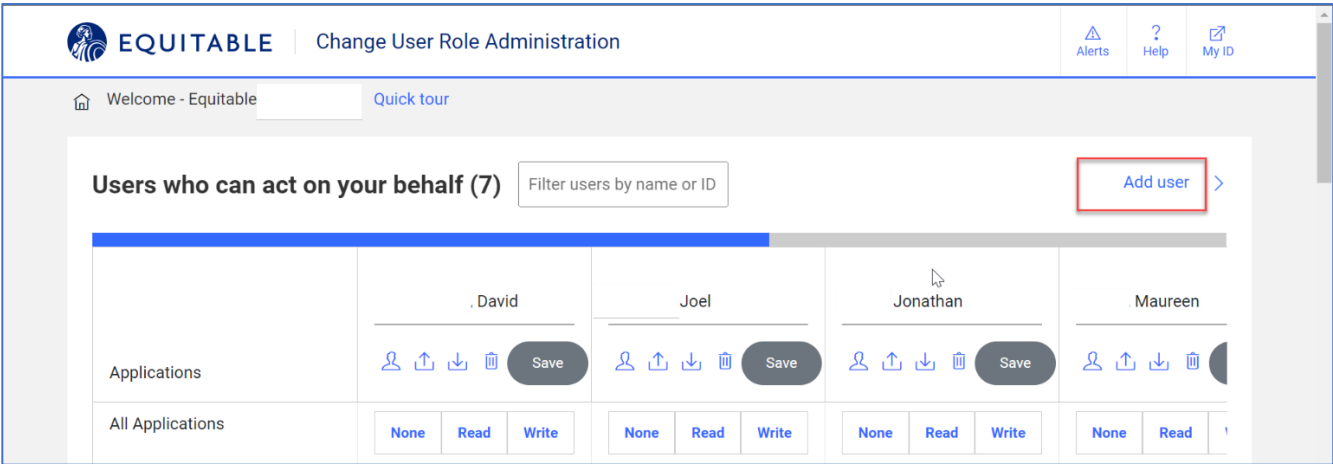
SET UP CUR FOR AN ADMIN USER OR JOINT WORK PARTNER

The Financial Professional (FP) performs these steps.

1. Log into equitable.com and select – **Change User Role – Administration** from the drop-down menu bearing the FP’s name.



2. For a new CUR user click on **Add user**.
If the user already has delegated CUR access, please go to step 4.



3. Search for the name or ID of the new CUR user and click the + sign to add the user.



Add a user to act on your behalf

Filter

+ 👤	Jones, Cicely	NoCal/Hawaii
+ 👤	Jones, Cleopatra	

4. Select Equitable Advisors **Write** access and click

Marketing Suite and choose **Save**.

Users who can act on your behalf (7)

		Maureen			Grp, -
Applications	Save	👤 👤 👤	Save	👤 👤	
	Write	None Read Write	None		
AEGIS	☒	☐ ☐	☒		
Alerts	☐	☒ ☐	☒		
Annuity New Order & Fee Search	☒	☐ ☐	☒		
Asset-Map	☐	☐ ☒	☒		
Associate Data and Reports	☐	☒ ☐	☒		
Client Profile HUB	☒	☐ ☐	☒		
Contract Quote	☐	☒ ☐	☒		
ePolicy Delivery	☐	☒ ☐	☒		
Equitable Advisors Marketing Suite	☐	☐ ☒	☒		

Note: for staff member to have access to CRM integration functionality within Marketing Suite, be sure to enable CUR access to Salesforce too.

Access via CUR to Marketing Suite will be enabled within 48 hours of initial setup.

MANAGING APPLICATION PERMISSIONS WITHIN MARKETING SUITE AT ACCOUNT LEVEL



Once the CUR set up is complete, delegate users are shown in your Marketing Suite account on Users tab. (Hover on your name to expose the Users tab). The account owner will be shown with an Admin role and all CUR users will be shown with a role of User and have “delegate” appended to their name.

Note: If you have multiple Marketing Suite accounts, the delegate user will be set up in each account. You can manage their permissions in each account as described below.

The screenshot shows the 'Users' tab in the Marketing Suite interface. The left sidebar contains navigation options: Content Library, Website, Blog, Automated Marketing, Email, Social, Events, SETTINGS (Profile, Contacts), and EXTRAS (Help). The main content area is titled 'Users' with the subtitle 'Manage your users and their permissions.' Below this is a section for 'Active Users' containing a table with columns for Name, Username, and Role. The table lists three users: 'Heath' (role: Admin), 'Mia' (role: User), and 'Sara' (role: User). The 'Heath' user's name is highlighted with a red box. To the right of the table are 'Remove' buttons for each user. A user profile dropdown menu is visible on the right side of the screen, with the 'Users' option highlighted.

Name	Username	Role
Heath	heatf	Admin
Mia	mia	User
Sara	sara	User

To modify delegate users access levels, open their record by clicking the name hyperlink.

The screenshot shows the 'Edit User' form for the user 'Heath'. The form is divided into sections: 'General Information' and 'Access'. The 'General Information' section includes fields for Name, Username, and Email. The 'Access' section contains a grid of checkboxes for various functionalities. The 'Access' section is highlighted with a red box. Below the 'Access' section is a 'Notifications' section with a toggle switch.

Access		
☒ AutomatedMarketing	☒ Blog	☒ Compliance
☒ Contacts	☒ Custom Email	☒ Events
☒ Inbox	☒ Lead Gen Popups	☒ Content
☒ Profile	☒ Social Posting	☒ Website

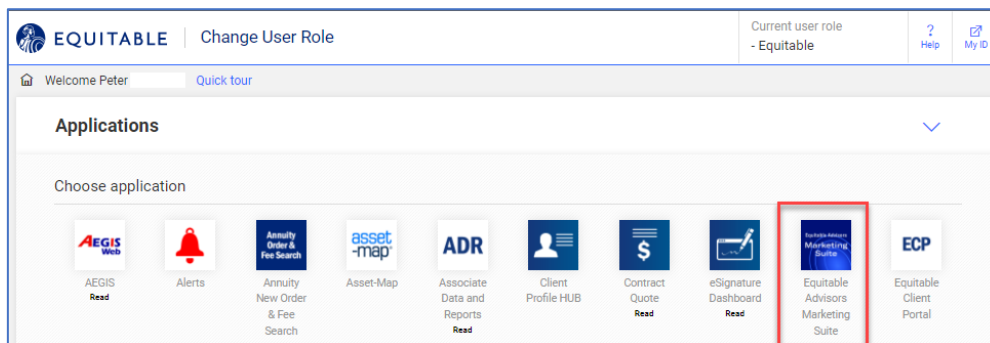
Uncheck specific access levels for functionality you do not want the CUR users to have. Note: for Marketing Suite only users, you will not see access to Website only functionality (Blog, Lead Gen Popups, Website). If a delegate was granted access to multiple accounts owned by same Financial Professional you can remove access as desired in one account by deselecting each checkbox listed in the Access tab.



LOGGING INTO MARKETING SUITE BY THE CUR USER

The CUR user performs these steps.

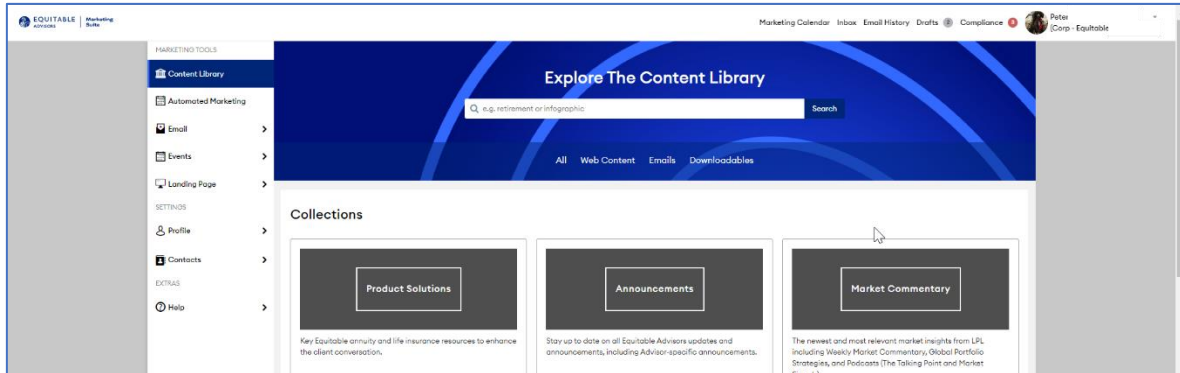
1. Log into equitable.com and select **Change User Role** from the Profile drop-down.
2. Locate the FP's name for which you have been granted CUR access to and click **Select Role**.
3. Select Equitable Advisors Marketing Suite from the application menu; it will launch in a separate window.



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



5. The home page of the selected FP will open within the Marketing Suite platform.



Note: if you are modifying your Salesforce sync by creating a new campaign or updating campaign members, you will need to launch Salesforce via CUR to conduct those functions. For CUR users who support multiple FP's, it is especially important to ensure when synchronizing contacts from Salesforce to Marketing Suite that you have cleared cookies and have opened a new browser window before synchronizing, so the correct Salesforce records are synchronized.

REMOVING / DELETING A CUR (DELEGATE) USER

Removing (deleting) a delegate user from your Marketing Suite account is a two step process.

Step 1: Modify the user access in the CUR Administration tool on Equitable.com. In the CUR Administration tool you can either:

- delete all CUR access by clicking on the trash can icon
- delete Marketing Suite access by updating access level to "none"



EQUITABLE | Change User Role Administration

Welcome - Equitable Annuity Eapp [Quick tour](#)

Users who can act on your behalf (6) [Add user](#)

Applications		Jonathan	Maureen		Peter
	Save	Save	Save	Save	Save
	Write	None Read Write	None Read Write	None Read Write	None Read Write
AEGIS	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☒ ☐
Alerts	☐	☒ ☐ ☐	☐ ☒ ☐	☒ ☐ ☐	☐ ☐ ☒
Annuity New Order & Fee Search	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☐ ☒
Asset-Map	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☐ ☒
Associate Data and Reports	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☒ ☐
Client Profile HUB	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☐ ☒
Contract Quote	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☒ ☐
Employer Plan Administration	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☒ ☐
ePolicy Delivery	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐
Equitable Advisors Marketing Suite	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☐ ☒
Equitable Client Portal	☐	☒ ☐ ☐	☒ ☐ ☐	☒ ☐ ☐	☐ ☐ ☒

Step 2: In the Users tab in Marketing Suite, click on "Remove" to delete a delegate record.

EQUITABLE | Marketing Suite

Marketing Calendar | Inbox | Email History | Drafts | Compliance | [My ID](#)

Users
Manage your users and their permissions.

Active Users

Name	Username	Role
mully Eapp	mully	Admin
Peter	pet	m-delegate

[Remove](#)

1/2 of 2

Select OK to confirm deletion.

Confirm

You are about to delete this user permanently. Press Ok to continue.

[Never Mind](#) [OK](#)



EQUITABLE
ADVISORS

**Marketing
Suite**

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- Contact MarTech Project Team: AdvisorMartech@Equitable.com