

# MARQUIS

## DOCUMATIX



## IMPLEMENTING MARKETING TEXT MESSAGES

800.365.4274 [WWW.GOMARQUIS.COM](http://WWW.GOMARQUIS.COM)

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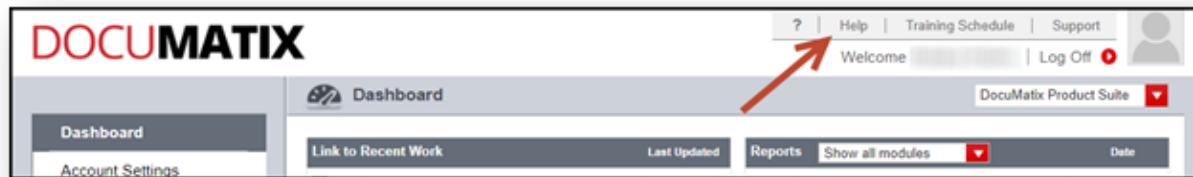
# IMPLEMENTING MARKETING TEXTS

## STEPS TO IMPLEMENTING MARKETING TEXTS.

Marketing Texts are sent within the DocuMatix Product Suite. These types of text messages are more generalized and can serve as awareness messages. To send marketing text messages, a financial institution must receive a literal opt-in from the customer. Check with your compliance department for your local laws on texting. Each message is allowed 140 characters; 20 characters are reserved for the opt-out option. The cost is simply \$.05 per delivered text message.

**Timeline:** The set-up usually takes a day. You will work with our Data Services to create Keywords for opting-in and opting-out, as well as the messaging for your opt-in and opt-out language. The time it takes to create campaigns depends on your experience within the DocuMatix Product Suite. We offer many resources and training to help you optimize the process.

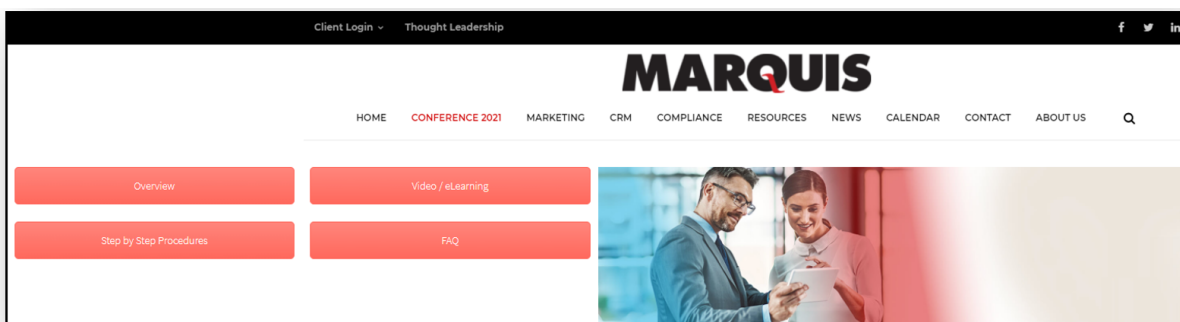
**Training:** Training and Support is easy to access. Within your DocuMatix Platform, you will find the HELP tab.



This tab will take you to the dashboard for your online resources; Overview, Video/eLearning, Step by Step Procedures, and FAQ.

- Our Help Videos are a quick and easy way to learn about DocuMatix Text Messaging. If you select Video/eLearning, you will see that we have videos for every functionality of DocuMatix.
- The Step by Step Procedures is another great place to find helpful information. There, you will find access to documents that are very detailed and easy to follow if you need assistance.

If you have a specific question, be sure to check out our FAQ page to get the fastest answer.



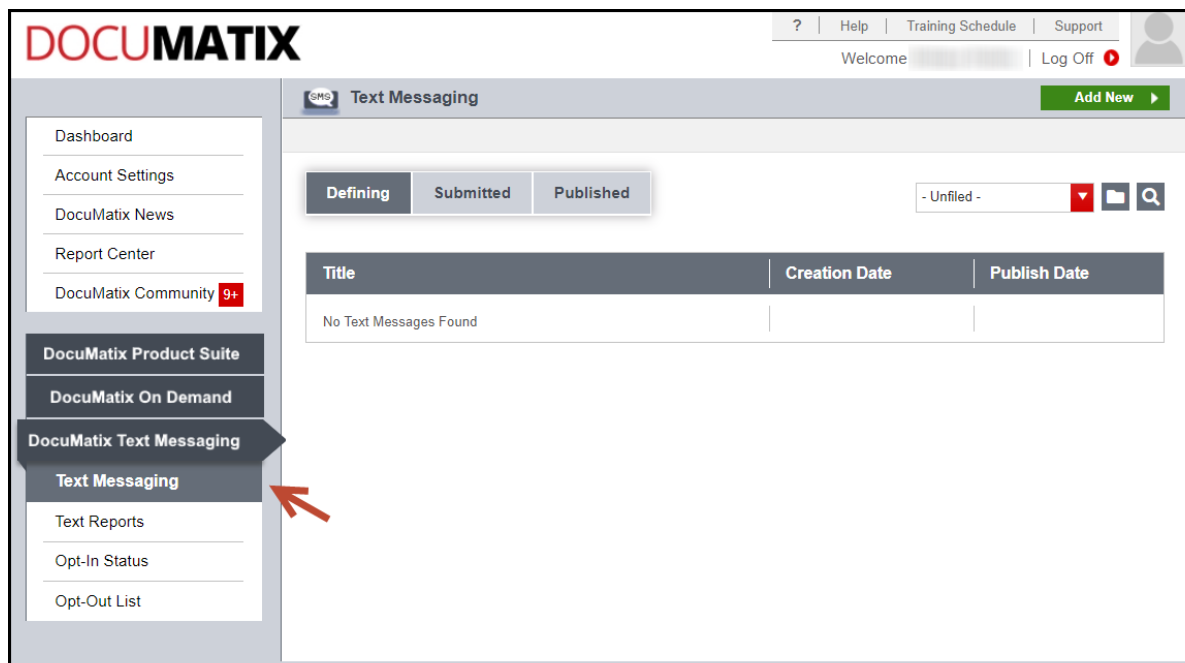
# IMPLEMENTING MARKETING TEXTS

For your convenience, click the video below to begin learning more about Marketing Text Messaging!



## GETTING STARTED

To access your Text Messaging capabilities from the Dashboard, click on DocuMatix Text Messaging. Here, you will have access to **Text Messaging, Reports, Opt-In** and **Opt-Out Status**.



# IMPLEMENTING MARKETING TEXTS

## CREATING A TEXT MESSAGE

### STEP

#### Step 1

Click the green **Add New** button

#### Step 2

Choose a **Folder** (optional) and type the **SMS Title**

#### Step 3

Type the message within the **SMS Text Message** box

#### Step 4

Sending a **Sample Text** (optional)

#### Step 5

Click **Submit** once setup is complete

### ADDITIONAL INFORMATION

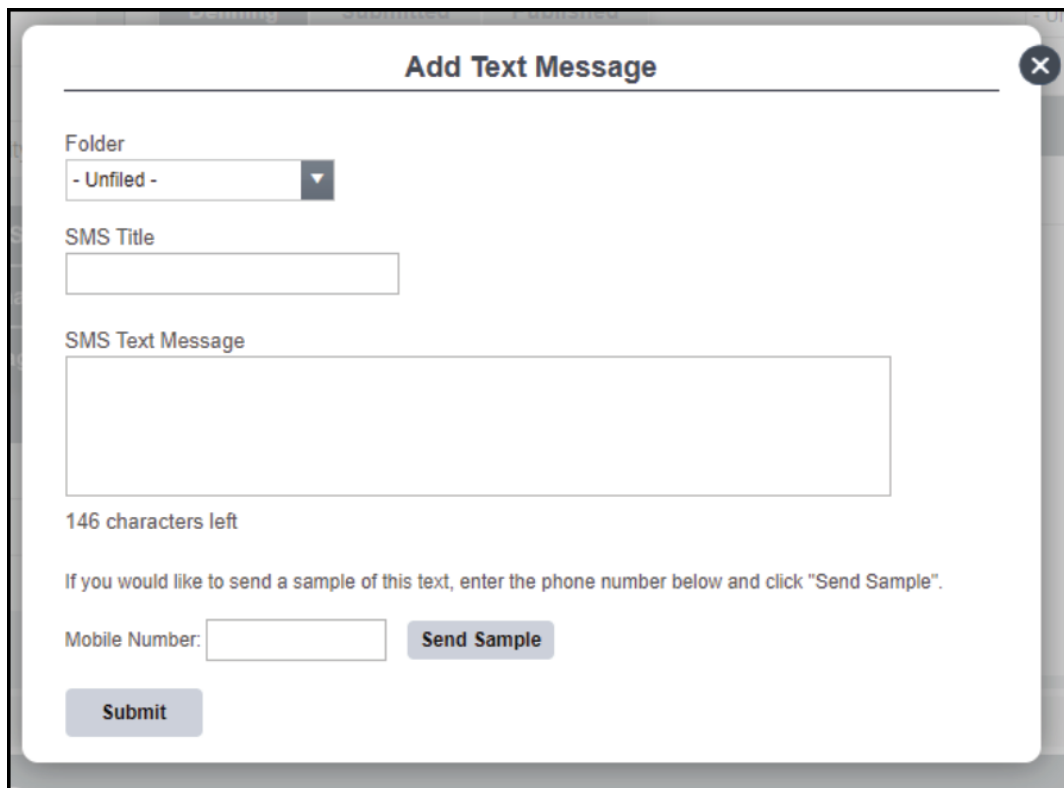
**Add Text Message** pop up will appear for you to create the Text Message.

If you want to organize your text messages into **Folders**, you can select which folder to store messages in using the "Folder" drop-down. (The message will be stored in "Unfiled" if you don't select a folder.)

This is the message that the recipient will see. You will see the number of characters you have left at the bottom. Note: You do not need to add Opt-out wording; that will be added automatically at the end.

If you would like to send a sample of your text message, simply type in a **Mobile Number**, then click **Send Sample**.

By clicking **Submit**, you have created the Text Message and it will appear under **Defining**.



The screenshot shows a pop-up window titled "Add Text Message" with a close button (X) in the top right corner. The form contains the following elements:

- Folder:** A dropdown menu currently showing "- Unfiled -".
- SMS Title:** A text input field.
- SMS Text Message:** A large text area for entering the message content.
- Character Count:** Below the text area, it says "146 characters left".
- Sample Text:** A line of text that reads: "If you would like to send a sample of this text, enter the phone number below and click 'Send Sample'".
- Mobile Number:** A text input field next to the label "Mobile Number:".
- Buttons:** A "Send Sample" button next to the mobile number field, and a "Submit" button at the bottom left.

# IMPLEMENTING MARKETING TEXTS

## PUBLISHING A TEXT MESSAGE

### STEP

#### Step 1

Click on the **Text Message** in **Defining**, then select **Publish**

#### Step 2

Make the **Publish Date/Time** selections

#### Step 3

Select who to **Send Text Message To**

#### Step 4

Type in the **Notification Email** (optional) then click **Publish**

### ADDITIONAL INFORMATION

When you click on a Text Message that is in **Defining**, you will have the options to **Edit**, **Delete**, or **Publish**.

This will be the **Date/Time** that your Text Message will be delivered. Note: For new opt-ins, you can schedule an automatic message to be sent by using the **Auto launch**.

You have two options; send to **All Subscribers** (whoever has opted in will receive the Text Message) or **Subscribers on Opt-in Date** (you can search by a specific date). Example: If you ran a promotion to increase opt-ins for text messaging and after the promotion ends you want to follow up with the people that opted in during that timeframe, you could choose the **Subscribers on Opt-in Date** instead of sending it to all subscribers.

If you would like to receive a **Notification Email** when the delivery is complete, simply enter the email you want to receive it. Once you **Publish** the Text Message, it will be shown in **Submitted** status.

### Publish Text Message

**Publish Date/Time**  
This is the Date/Time that your SMS Text Message will be delivered to your subscribers.

01/21/2021 @ 9:00 AM Mountain Time

Auto launch to new opt-ins

**Send Text Message To**  
 All subscribers  Subscribers on Opt-In Date

**Notification Email**  
if you would like a notification email sent when the delivery is complete, please specify an email address below.

**Publish**

# IMPLEMENTING MARKETING TEXTS

## TEXT REPORTS

### STEP

#### Step 1

Under **DocuMatix Text Messaging**, click on **Reports**

#### Step 2

Make the **Publish Date/Time** selections

### ADDITIONAL INFORMATION

**Subscriber Summary for Keyword:** Gives your total of Text Message subscriber information.

**Subscriber Opt-Ins:** Click the drop-down arrow to determine how far back to show opt-ins.

This will be the **Date/Time** that your Text Message will be delivered. Note: For new opt-ins, you can schedule an automatic message to be sent by using the **Auto launch**.

The screenshot displays the DocuMatix interface. The top navigation bar includes links for Help, Training Schedule, and Support, along with a user profile icon and a 'Log Off' button. The main content area is titled 'Reports' and features a 'Subscriber Summary for Keyword (MQAdd)' section. This section shows 'Total Opt-Ins: 1', 'Total Opt-Outs: 1', and 'Total Current Subscribers: 0'. Below this is a 'Subscriber Opt-Ins' section with a dropdown menu set to 'Opt-Ins [last 30 days]'. The text 'No Data Found' is visible in the data area. Red arrows point to the dropdown arrow and the 'Total Opt-Ins' value. A sidebar on the left contains navigation options such as 'Dashboard', 'Account Settings', 'DocuMatix News', 'Report Center', 'DocuMatix Community 9+', 'DocuMatix Product Suite', 'DocuMatix On Demand', 'DocuMatix Text Messaging', 'Text Messaging', 'Text Reports', 'Opt-In Status', and 'Opt-Out List'.

# IMPLEMENTING MARKETING TEXTS

## MANUALLY OPT-OUT MOBILE NUMBERS

### STEP

### ADDITIONAL INFORMATION

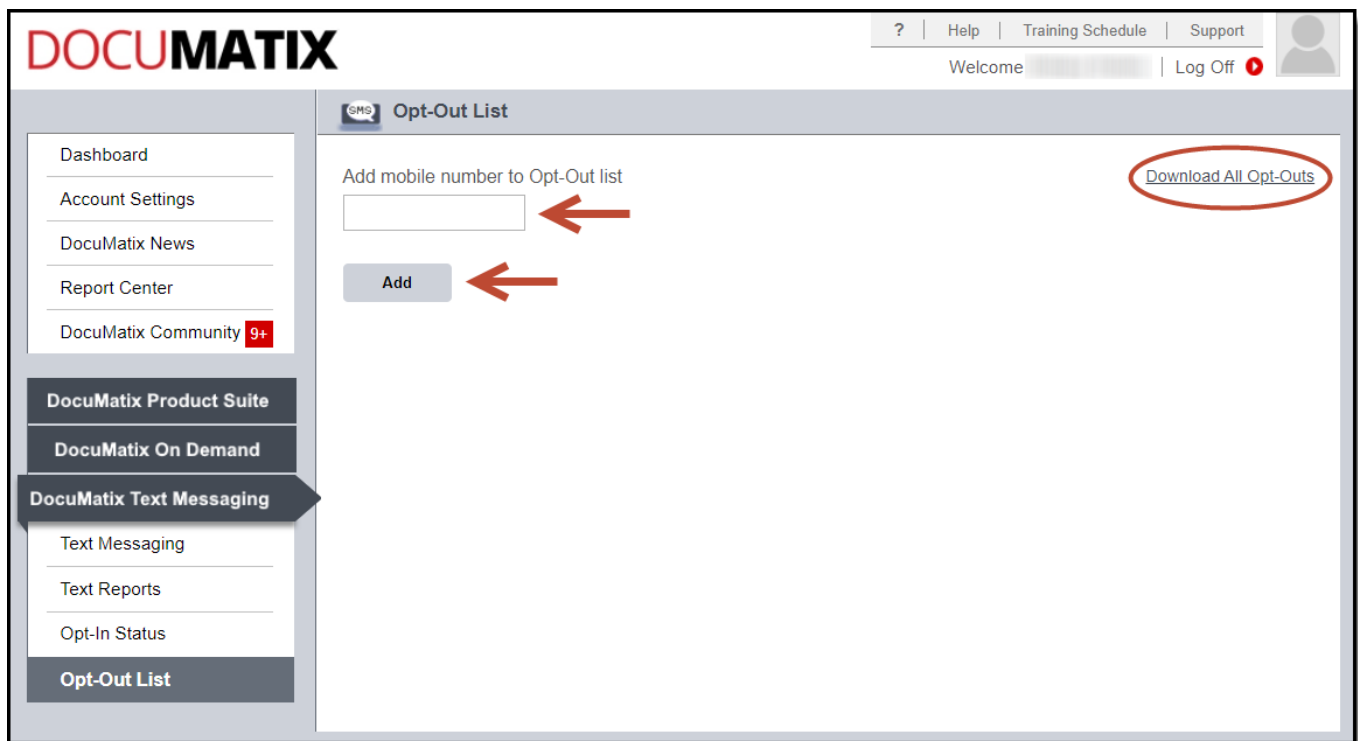
#### Step 1

Under the **DocuMatix Text Messaging**, click on **Opt-out List**

To see a list of all opt-outs, click **Download All Opt-outs**.

#### Step 2

Type in a **Mobile Number**, then click **Add**





# GUIDE FOR COLLECTING OPT-INS

## GUIDE FOR COLLECTING OPT-INS – MARKETING

Before sending any text messages through DocuMatix, it is important to collect your opt-ins first. For Marketing Text messages, it must be a literal opt-in. For an Operational Triggered Text, the opt-in can be gathered offline (see Operational Text Message for more details).

### Tips for collecting opt-ins:

- Send your members an email announcement that you offer text messaging
- Set up a page on your website explaining how to opt-in
- Place an article in your newsletter
- Provide an interrupt page explaining how to opt-in when logging into online banking

The following information could be sent as an email, adapted for an article in your newsletter, or posted on your website. It is the responsibility of the Financial Institution to confer with their Compliance Department for approval. Anything highlighted in yellow, please change to your institution. Anything highlighted in gray, we recommend getting approval with your Compliance Department.

Be the first to learn about important Marquis Federal announcements and events.

Stay Connected with Connect Text

### What is Marquis Federal Connect Text?

Marquis Federal will send text messages to anyone who has opted into our mobile opt-in list. Not only will you receive messages notifying you of important news like weather-related branch closings, upcoming events and special promotions, you will receive offers and opportunities that are exclusive to those who have opted in for this service.

### Who can opt-in?

Anyone! You don't have to be a member to receive text messages from Marquis Federal.

### How can I opt-in?

You can opt-in from any mobile device – just text keyword MQFED to 888-555-1234. You will receive a welcome message like this: "Welcome to Marquis Federal's Connect Text! You will receive up to 6 messages per month with information and offers."

### How can I opt-out of this service?

Text STOPMQFED to 888-555-1234. You can reply STOPMQFED whenever you receive a Marquis Federal Connect Text.

# GUIDE FOR COLLECTING OPT-INS

They are created and scheduled for delivery by **Marquis Federal**. We facilitate the opt-in/opt-out and delivery of text messages in direct compliance with the Mobile Marketing Code of Conduct.

Message frequency may vary. (if you do not know how often you will send messages or specify if you do know) /You will receive up to six alerts per month once your subscription has been confirmed. You can opt-out at any time by sending **STOP to 888-555-1234**. Message and Data Rates May Apply. By sending **MQFED to 888-555-1234**, you accept our **Terms and Conditions\***.

## \*Connect Text Terms & Conditions

### PROGRAM DESCRIPTION

**Marquis Federal** will send news, promotions, events, and exclusive offers to the opted in mobile number in the form of text messages.

### FREQUENCY OF MESSAGES

**Message frequency may vary.** (If you do not know how often you will send a text message, you may use "message frequency will vary.")

OR

**A maximum of 6 messages a month.** (You can specify the number of messages Compliance approves).

### PRICING

There is no direct cost from **Marquis Federal** to the end user for use of our mobile service. However, message and data rates may apply from your mobile carrier/service provider.

### SERVICE CONTACT

Contact our Customer Service at 1-XXX-555-4321

### MOBILE USER OPT-IN/OPT-OUT

**Marquis Federal** provides a text messaging service to communicate news, **promotions, events and exclusive offers**. By texting **MQFED to 888-555-1234**, you agree to receive text messages from Marquis Federal. To opt out from receiving messages text **STOPMQFED to 888-555-1234** at any time.

### MOBILE USER PRIVACY

We will never rent or sell your cell phone number to any third party.

By opting into the service from **Marquis Federal**, you are agreeing to receive SMS text messages specific to the Connect Text service.

### MOBILE WARRANTY

Marquis Federal will not be liable for any delays in the receipt of any SMS messages connected with this program. Delivery of SMS messages is subject to effective transmission from your mobile carrier/service provider/network operator.