

MARQUIS

DOCUMATIX



IMPLEMENTING OPERATIONAL TEXT MESSAGES

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IMPLEMENTING OPERATIONAL TEXTS

STEPS TO IMPLEMENTING OPERATIONAL/TRANSACTIONAL TEXTS.

Operational Texts are sent within the DocuMatix on Demand platform. These types of text messages are triggered and configured just as a triggered email. Operational text messages have an offline opt-in/opt-out process and do not require having opt-out wording in each message. Since Operational Texts do not need the opt-out wording, each message is allowed 160 characters. The cost is simply \$.05 per delivered text message.

Timeline: The set-up time for operational text messages to trigger depends on how quickly your DocuMatix on Demand is set up in your environment. Since they trigger just like an email, you will need to set up a folder structure for the source and process file.

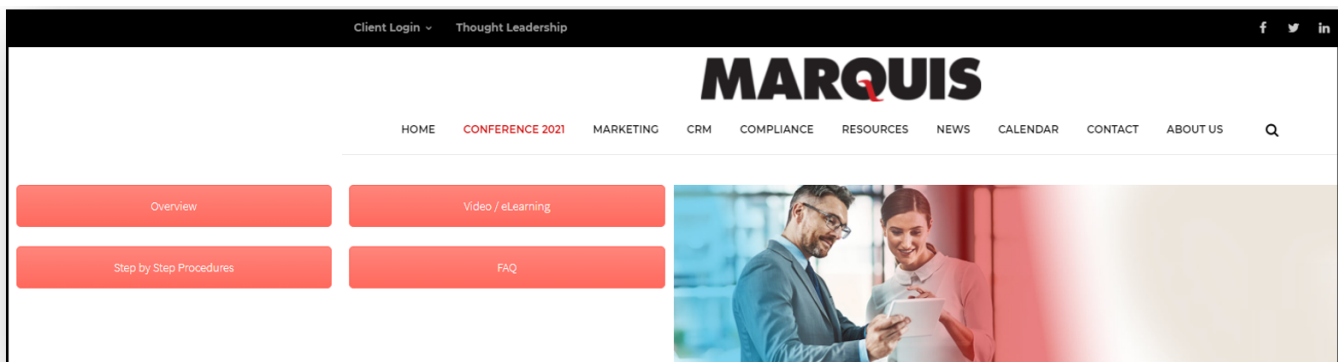
Training: Training and Support is easy to access. Within your DocuMatix Platform, you will find the HELP tab.



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.



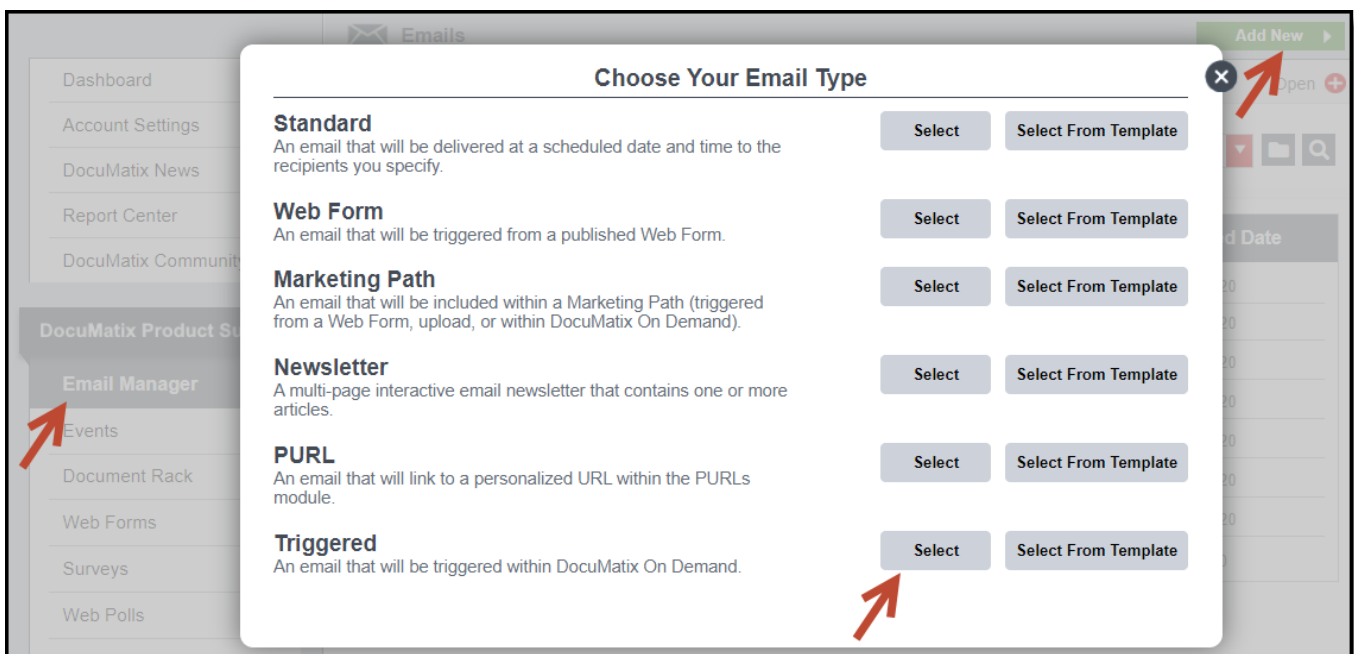
IMPLEMENTING OPERATIONAL TEXTS

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



GETTING STARTED

To create an Operational Text, begin as if you were creating a Triggered Email within the Email Manager. Begin by clicking the green "Add New," then Select "Triggered"



IMPLEMENTING OPERATIONAL TEXTS

CREATING A TRIGGERED TEXT

Step 1

Complete Details as you normally would when creating an email, then click **Next**

Some of the fields will auto-populate from Account Settings and anything in italics is an optional field.

- **Campaign name**
- **Email type**
- **Description** (optional)
- **Reply email address**
- **Subject:** You have the option to **Insert Merge Fields** and **Insert Emoji**
- **Email Snippet:** You can “Insert Merge Fields”
- **Use responsive design**
- **From**
- **Place in folder**

The screenshot shows the 'Emails - Create (Triggered)' interface. At the top, there are navigation links for 'Email Templates', 'Marketing Paths', and 'Articles'. Below this, there are two tabs: 'Details' (active) and 'Editor'. The form contains the following fields and options:

- Campaign name:** An empty text input field.
- Email type:** Radio buttons for 'Editor' (selected) and 'HTML'.
- Layout mode:** Radio buttons for 'Mobile (single-column email)' and 'Desktop (multi-column email)'.
- Description:** An empty text input field.
- Reply email address:** A text input field containing 'learning@gomarquis.com'.
- Subject:** An empty text input field with buttons for 'Insert Merge Fields' and 'Insert Emoji' to its right.
- Email snippet:** An empty text input field with an 'Insert Merge Fields' button to its right.
- Use responsive design:** A checked checkbox.
- From:** A text input field containing 'Marquis Learning & Development'.
- Place in folder:** A dropdown menu showing '- Unfiled -'.
- Next:** A button at the bottom of the form.

IMPLEMENTING OPERATIONAL TEXTS

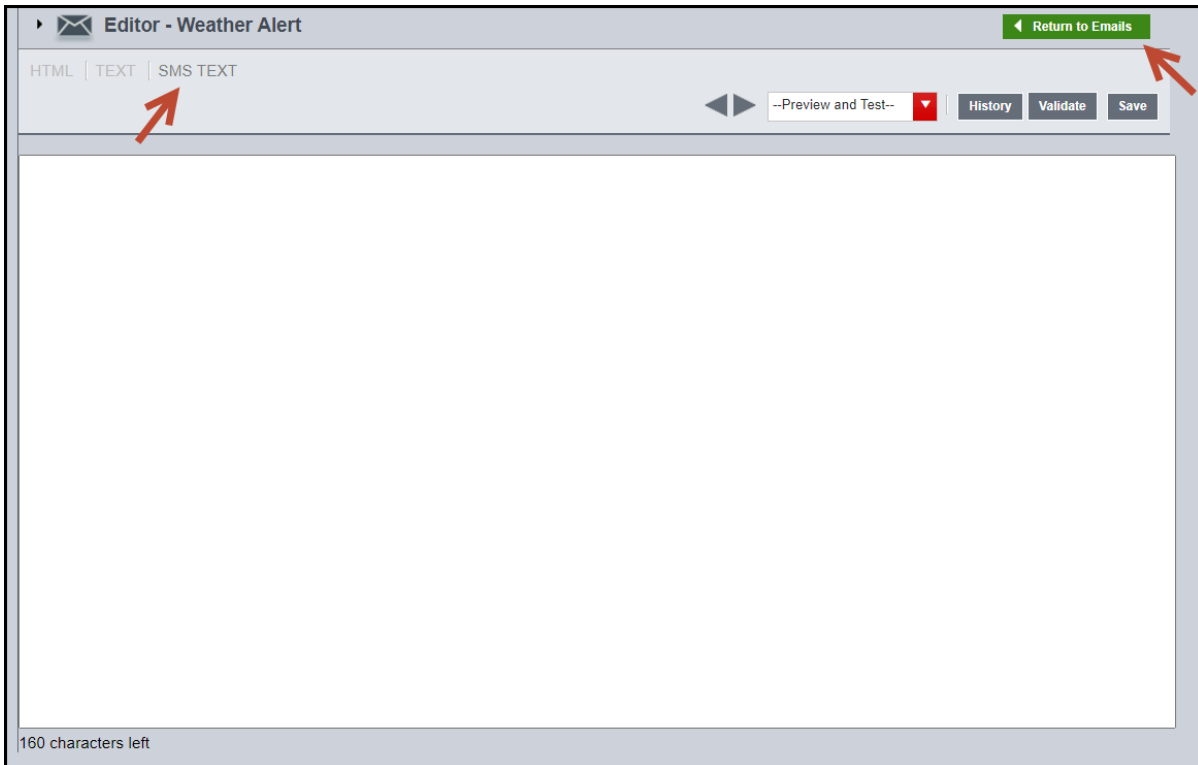
STEP

Step 2

Click on SMS Text and begin typing your message in the white box. When you are done, click on the green "Return to Emails."

ADDITIONAL INFORMATION

The system will automatically save every minute, but we do recommend clicking Save when you are finished.



PUBLISHING A TRIGGERED TEXT

STEP

Step 1

Within the **Email Manager**, click on the specific Trigger Email, then click **Publish** from the menu.

Step 2

Validate the email to make sure there are no errors and that any links and/or images render correctly. If you are good to go, click **Next**.

ADDITIONAL INFORMATION

To automate the Trigger email, you will need to continue within the **DocuMatix Configuration Tool**. Please reference the Configuration Tool procedures for a step-by-step guide to the process.

Any Critical Errors must be fixed before sending.

Validate Email

Email name: Welcome to Marquis! Re-Evaluate

Critical Errors (Must be resolved before sending)

Issue	Action
No critical errors found	

Suggestions (Not required before sending)

Issue	Action
No suggestions found	

Images

No images found

Links

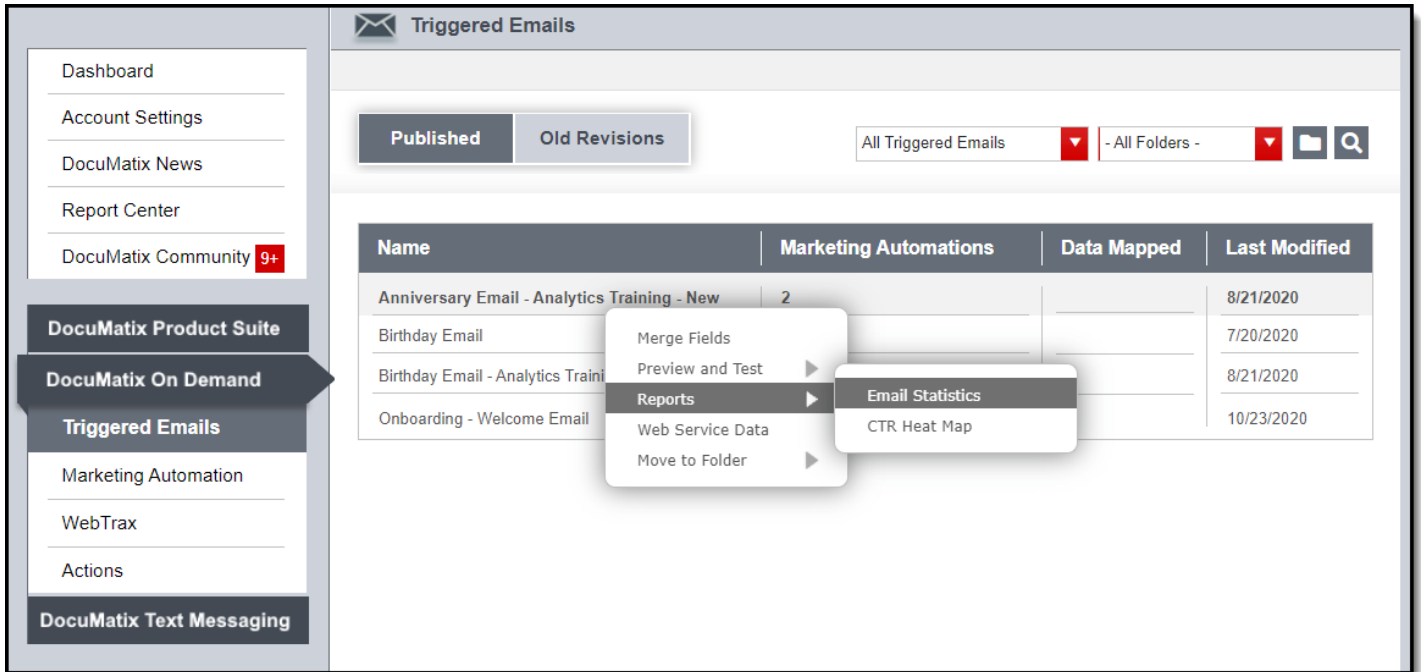
No links found

Next

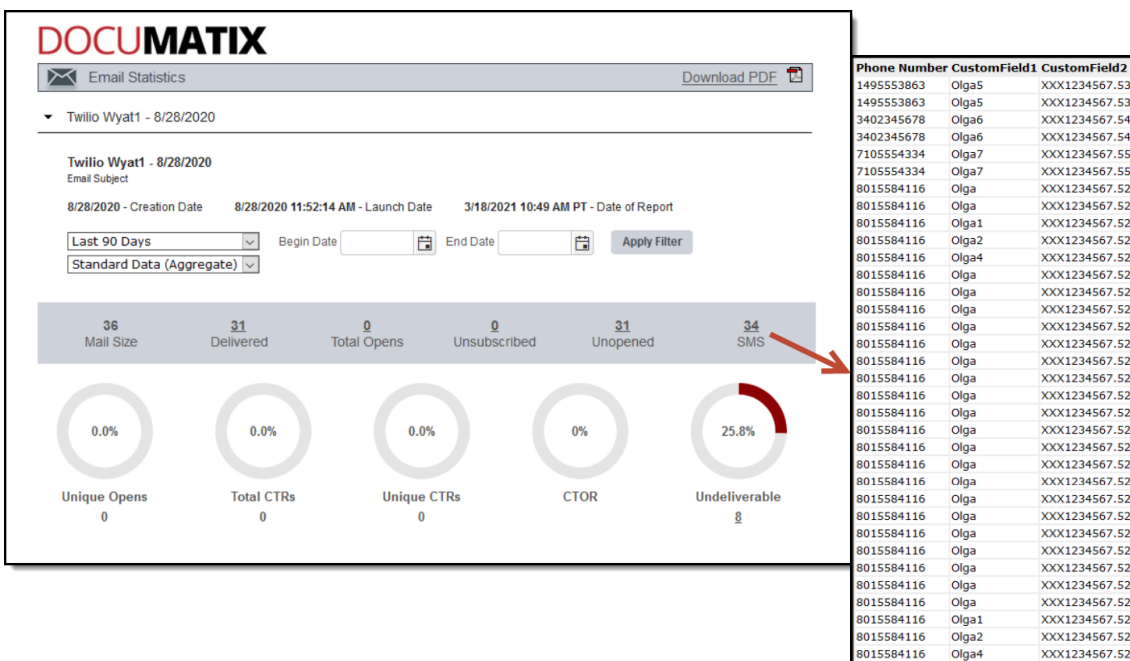
IMPLEMENTING OPERATIONAL TEXTS

TEXT REPORTS

Viewing reports for Operational Texts is the same process you would use for a Triggered Email. Simply click on the Triggered SMS, then Email Statistics Report.



In pulling the Email Statistics Report for a Text, everything is recorded by the phone number. If you want additional information tracked, such as a name or ID number, it needs to be included as a Custom Field when creating the Text.



COLLECTING OPERATIONAL/TRANSACTIONAL OPT-INS

Before sending any text messages through DocuMatix, it is important to collect your opt-ins first. For an Operational Triggered Text, the opt-in can be verbal (with the consent of your Compliance Department) or written.

Notes:

- Since Operational Texts are sent through DocuMatix on Demand, a .CSV file will need to include a field for mobile numbers.
- Work with your IT/IS to make sure you have a field within your core processor for MOBILE numbers.
- To make your texting the most effective, we encourage you and your staff to strive to verify and update contact information for your members/customers.
- Make sure you only include MOBILE numbers in the .CSV file, not just contact numbers. This will avoid sending text messages to land lines, work numbers, etc.

Tips for collecting opt-ins:

- Send your customers/members an email announcement that you offer text messaging with opt-in instructions via Web Form
- Set up a page on your website with information and a Web Form that can be completed to opt them in
- Gather opt-ins at account opening
- Hold a contest to encourage opt-ins
- Place an article in your newsletter informing customers/members that you offer text messaging with opt-in instructions
- Provide a prompt to opt-in to text messaging when logging into online banking
- Include opt-in language when loan documents are signed: "Customer/Member agrees to be communicated to by email, direct mail, telephone, and text."
- Use a pop up when a customer/member logs into online banking, asking them to update/verify their contact info (specifically asking for their mobile number). It can also include an opt-in to text messaging.

You must disclose that there is no opt-out ability/option within the text message. Instead a customer/member must contact the financial institution and request to be opted out. It is up to the financial institution to manage these opt-ins and opt-outs.

GUIDE FOR COLLECTING OPT-INS

The following information could be sent as an email, adapted as an article in your newsletter, or posted on a landing page 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.

Marquis Federal Text Alerts is a free service that helps our customers/members the know about their **Marquis Federal** accounts.

Enjoy the Benefits

- Completely free and easy enrollment
- Receive courtesy texts such as:
 - “Just a reminder that your payment of \$80.00 for your loan ending in 4321 due in 3 days”
 - “Oops! Did you overlook your payment for your loan ending in 4321?”

How It Works

It is simple. If your mobile phone number is on file with **Marquis Federal, on **Tuesday, December 11th**, you will receive an email from us with instructions for enrollment.**

Please make sure your mobile phone number and email address are up to date.

How to Update Your Mobile Phone Number and other contact information.

- Go to **MQFED.org** and log in to Online Banking
- Select the *Contact Us* tab
- Choose *Update Information* link
- Complete the Secure Web Form to update your contact information, then click *Submit*.

If you have enrolled to receive text alerts and would like to opt-out, please contact us at **555-521-5555** or visit the nearest branch location.