

In the printed form this is an uncontrolled document. The official version can be found online.

Subject: Sending text via QuickBase	Product: Customer Loyalty Group	Approved on:
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Purpose:

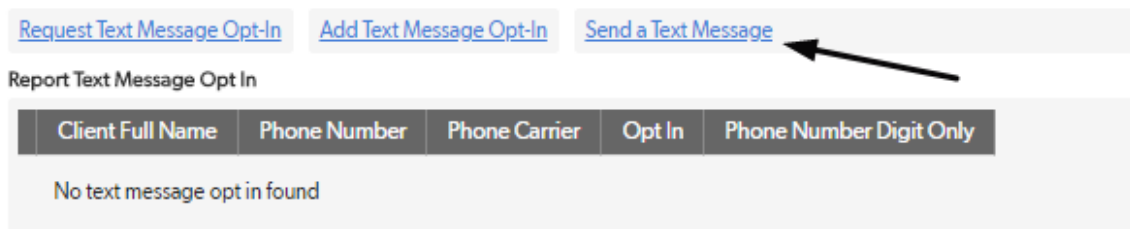
Contacting clients via text messages.

Policy:

Client request to receive text messages instead of calls or emails.

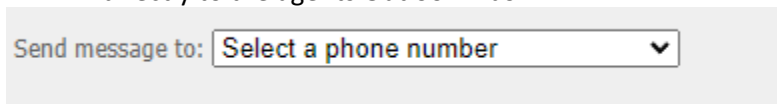
Procedure:

1. As pictured below, click on Send a Text Message



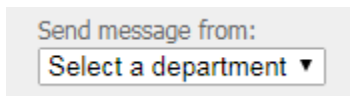
The screenshot shows a navigation bar with three links: 'Request Text Message Opt-In', 'Add Text Message Opt-In', and 'Send a Text Message'. An arrow points to the 'Send a Text Message' link. Below the links is a section titled 'Report Text Message Opt In' with a table containing columns: 'Client Full Name', 'Phone Number', 'Phone Carrier', 'Opt In', and 'Phone Number Digit Only'. Below the table, it says 'No text message opt in found'.

2. As pictured below, from the dropdown select a phone number. Client reply will come directly to the agents Outlook inbox



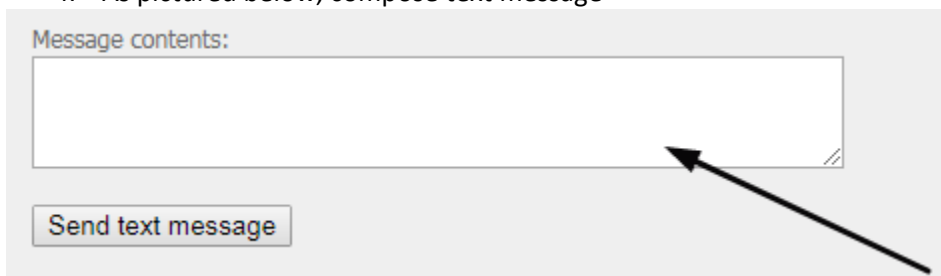
The screenshot shows a form with a label 'Send message to:' followed by a dropdown menu. The dropdown menu is open, showing a list of phone numbers. The selected option is 'Select a phone number'.

3. As pictured below, select a department from where the text is being sent
 - a. CLG
 - b. Authorization Team
 - c. Negotiations
 - d. Sales
 - e. Settlement Support Specialist



The screenshot shows a form with a label 'Send message from:' followed by a dropdown menu. The dropdown menu is open, showing a list of departments. The selected option is 'Select a department'.

4. As pictured below, compose text message



The screenshot shows a form with a label 'Message contents:' followed by a large text box. Below the text box is a button labeled 'Send text message'. An arrow points to the 'Send text message' button.

5. Click *Send text message*

Exceptions:

None

Latest Revision Date: 12/14/2018	Page 1 of 1	Author of Latest Revision: Ta'lor Soden
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