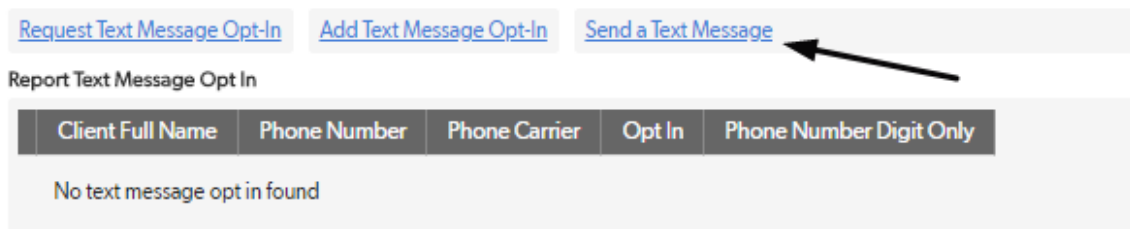| Subject: Sending text via QuickBase	Product: Customer Loyalty Group	Approved on:

Purpose:
 Contacting clients via text messages.

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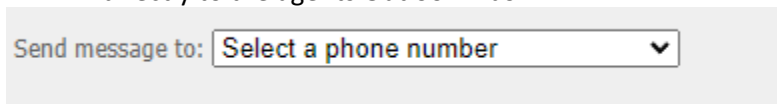Client request to receive text messages instead of calls or emails.

Procedure:

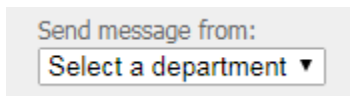1. As pictured below, click on Send a Text Message

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

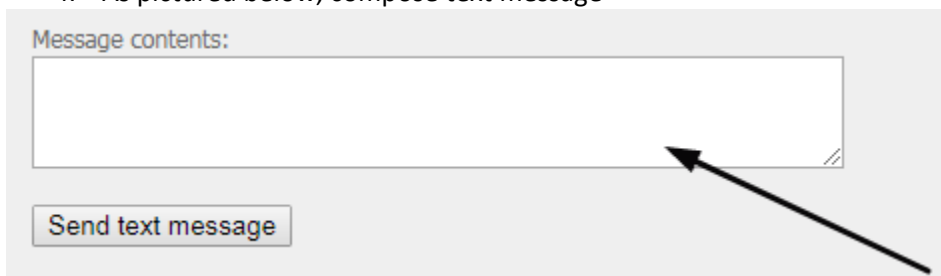3. As pictured below, select a department from where the text is being sent
    a. CLG
    b. Authorization Team
    c. Negotiations
    d. Sales
    e. Settlement Support Specialist

4. As pictured below, compose text message

5. Click *Send text message*

Exceptions:
None

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