

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:

- As pictured below, click on Send a Text Message

Request Text Message Opt-In Add Text Message Opt-In **Send a Text Message**

Report Text Message Opt In

Client Full Name	Phone Number	Phone Carrier	Opt In	Phone Number Digit Only
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No text message opt in found

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

Send message to: **Select a phone number**

- As pictured below, select a department from where the text is being sent
 - CLG
 - Authorization Team
 - Negotiations
 - Sales
 - Settlement Support Specialist

Send message from:
Select a department

- As pictured below, compose text message

Message contents:

Send text message

- 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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