Implementing Marketing Texts

Steps to Implementing Marketing Texts

Marketing text messages are sent within Digital Communication and are typically generalized, serving as awareness messages. To send these messages, financial institutions must obtain a literal opt-in from the customer, in accordance with local texting regulations. Consult your compliance department to confirm requirements. Each message is limited to 140 characters, with 20 characters reserved for the mandatory opt-out option.

Setup

We will create a dedicated toll-free number for your marketing texting. We recommend using a separate number from your operational text messages. Marquis will handle the setup and approval process with mobile carriers. The full setup may take up to four weeks; allow additional time if you choose to SMS-enable an existing toll-free number.

- Assigning a Toll-Free Number
  - If you want to SMS-enable an existing toll-free number, let us know. Otherwise, we'll assign a new one.
- Verifying Your Organization
  - This step is similar to your internal Know Your Customer (KYC) process used when onboarding new customers or businesses.
- Providing Opt-In Disclosure Details
  - Share how recipients will be informed about your opt-in keywords and texting use cases.
  - Include screenshots or disclosure document examples for validation.
- Keyword and Message Setup
  - Our Implementation team will help you create opt-in and opt-out keywords, along with compliant messaging.

Training and Support

Training is easy to access. Within Digital Communication, click SUPPORT or HELP in the top right corner to find messaging resources and assistance.
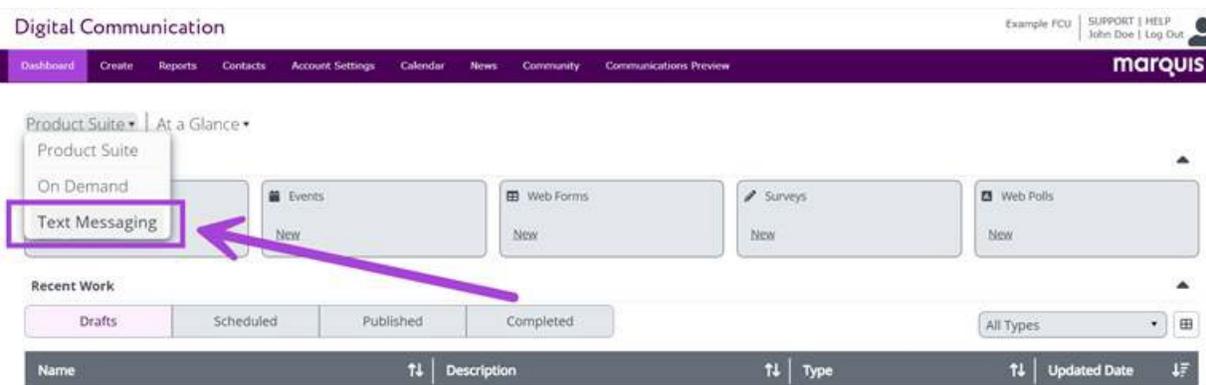
marquis

Implementing Marketing Texts
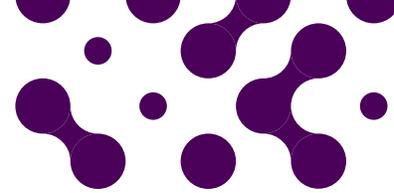
If you have questions, you can send a message to our Support team via the Support tab. For additional guidance, explore the following articles:

- [DCP Text Messaging Overview](#)
- [Text Messaging Overview](#)

Getting Started

To create a text message from the Dashboard, click Text Messaging from the drop-down menu. See below.
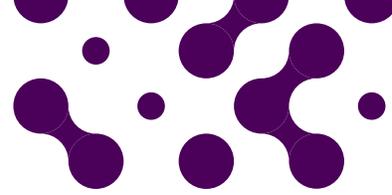

Creating a Text Message

Step 1

- Click the **Begin** button to start the message creation process.
- A pop-up titled Add Text Message will appear.

Step 2

marquis

- (Optional) Choose a **Folder** from the drop-down to organize your message.
    - o If no folder is selected, the message will be stored in Unfiled.
- Enter a name for your message in the **SMS Name** field.

Step 3

- Type your message in the **SMS Text Message** box.
- This is the message your recipients will receive.
- A character counter will appear at the bottom of the box.
    - o **Note:** Opt-out language is automatically added—no need to include it manually.

Step 4

- To preview your message, enter a **Mobile Number** and click **Send Sample**.

Step 5

- Once your message is ready, click **Submit**.
- Your message will now appear under the appropriate section.
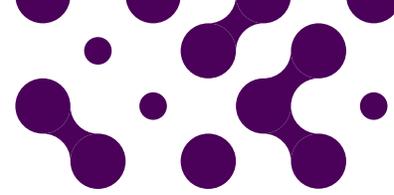

Publishing a Text Message

Step 1

- Click on the **Text Message** listed under the **Drafts** section.
- Choose **Publish** from the available options.
    - o You may also see options to **Edit** or **Delete** the message.

Step 2

- Choose the **Date/Time** when the message should be delivered.
    - o This determines when recipients will receive the message.
- (Optional) For new opt-ins, you can schedule an automatic message using **Auto launch to new opt-ins**.

Step 3

- Select who should receive the message:
    - o **All Subscribers**: everyone who has opted in.
    - o **Subscribers on Opt-In Date**: users who opted in during a specific timeframe.
        - ▪ Example: If you ran a promotion and want to follow up with those who opted in during that period, use this option.

Step 4

- Enter a **Notification Email** if you'd like to be alerted when delivery is complete.
- Click **Publish** to finalize.
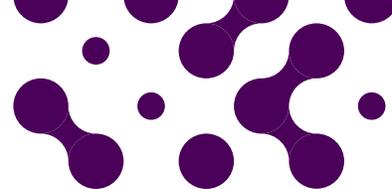   - o The message will now appear under the appropriate status.

Text Reports

Step 1

- While viewing the Text Messaging Dashboard, select the **Gear** icon within the Recent Work section.

Step 2

marquis

Implementing Marketing Texts

- Choose the **Text Reports** to view the opt-in/out report.
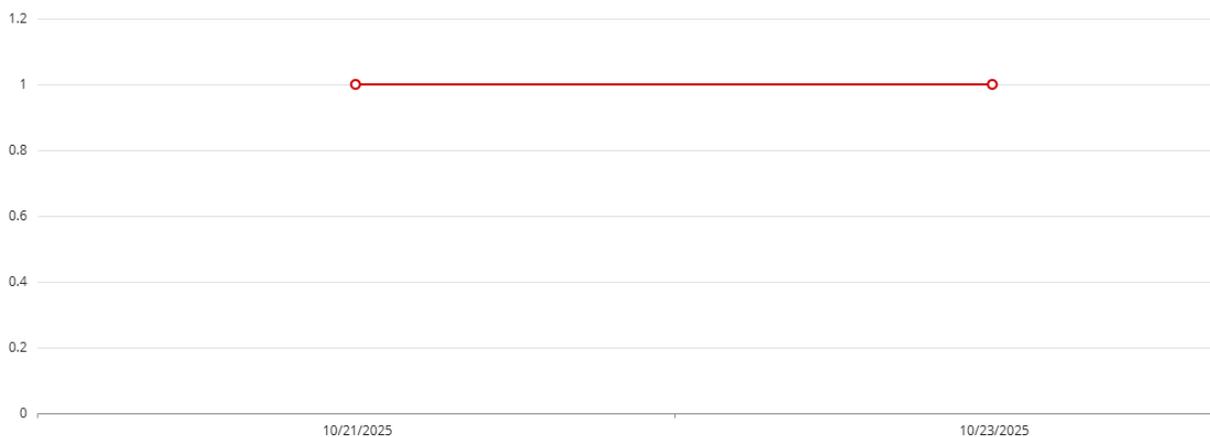
Additional Notes

- **Subscriber Summary for Keyword**
  - Displays the total number of subscribers associated with each keyword.
- **Subscriber Opt-Ins**
  - Use the drop-down arrow to select how far back to show opt-in activity.

Subscriber Opt-ins

Graph ▲

Subscriber Opt-ins

Opt-ins [last 30 days] ▼

| | 10/21/2025 | 10/23/2025 |

Subscriber Summary ▲

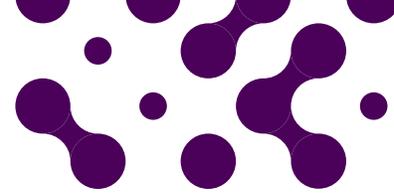| 1,749	205	1,544
Total Opt-ins	Total Opt-outs	Total Current Subscribers

Manually Opt-Out Mobile Numbers

Step 1

- While viewing the Text Messaging Dashboard, select the **Gear** Icon within the Recent Work section.

Step 2

marquis

- Choose the **Opt-Out List** to manually opt out mobile numbers.

Step 3
- Type in a **Mobile Number**, then click **Add**

Additional Notes

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

Guide for Collecting Opt-Ins—Marketing

Before sending any text messages through Digital Communication, 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 <mark>yellow</mark>, please change to your institution. For anything highlighted in <mark>gray</mark>, we recommend getting approval from your Compliance Department.
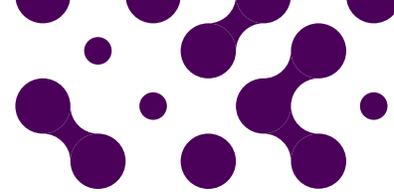
marquis

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

Stay Connected with Connect Text

What is Marquis Federal Connect Text?

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.

Marquis Federal will send text messages to anyone who has opted into our mobile opt-in list.

Who can opt in?

Anyone! You do not 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.

Messages 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
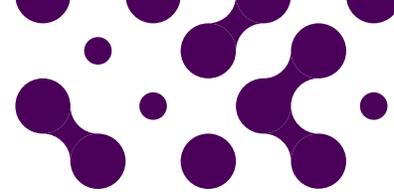
marquis

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

you may use "message frequency will vary.")

Message frequency may vary. (If you do not know how often you will send a text message) 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.
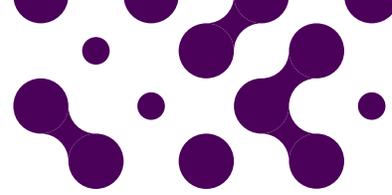
MOBILE USER PRIVACY

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.

marquis