

Steps to Implementing Operational/Transactional Texts

Operational text messages are sent through the Digital on Demand (DOD) platform and are automated through files, similar to triggered emails.

To ensure texting is effective, staff should regularly verify and update MOBILE numbers, not just general contact numbers, to avoid sending texts to landlines or work phones. Work with your IT/IS team to confirm that your core processor includes a dedicated field for mobile numbers.

All text messages, including operational texts, require an opt-in from the recipient. Unlike marketing texts, operational messages do not require opt-out language. Each message is allowed up to 160 characters.

Setup

We will create a dedicated toll-free number for your operational texting. We recommend using a separate number from your marketing 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.

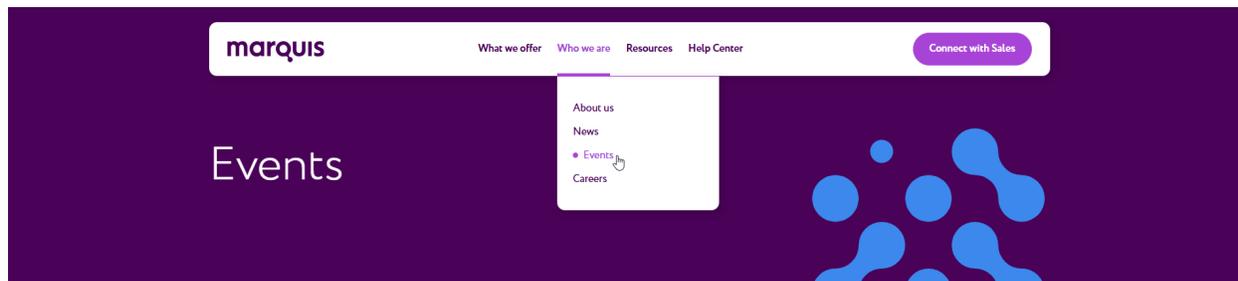
Digital on Demand (DOD) Configuration

While your number is being approved, we will work with you to set up DOD in your environment. Since operational texts trigger like emails, you will need to configure a folder structure for your source and process files.

Implementing Operational Texts

Training and Support

Training is easy to access. Visit GoMarquis.com and click the Events link under “Who we are.”



From there, select one of the upcoming events to register for a live training session.

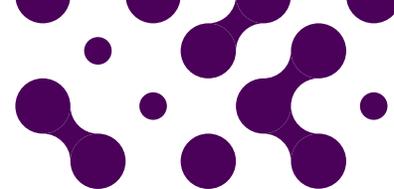
Support is also available within your Digital Communication platform. Click SUPPORT or HELP in the top-right corner to find messaging resources and assistance.

If you have questions, you can send a message to our Support team via the Support tab. You can also search for “text” or “operational text” to find related help articles.



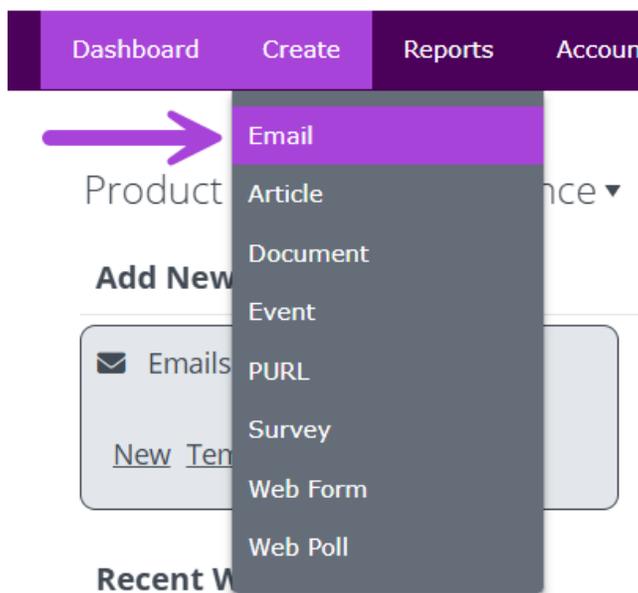
[See Article: Creating Triggered Operational Texts.](#)

Implementing Operational Texts



Getting Started

To create an operational text, begin as you would when setting up a Triggered Email within the Header Navigation or Email Dashboard.



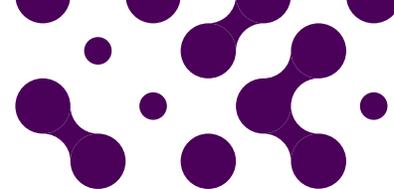
- Select Create from the top navigation bar.
- Choose Email from the dropdown menu.
- In the Basics step, select Triggered to begin building your operational text message.

1 The Basics 2 Editing your email 3 Inbox Appearance [Continue](#)

← Choose a communication type

 Standard An email that will be delivered at a scheduled date and time to the recipients you specify.	 Newsletter A multi-page interactive email newsletter that contains one or more articles.	 Web Form An email that will be triggered from a published Web Form.	 Marketing Path An email that will be included within a Marketing Path (triggered from a Web Form, upload, or within DocuMatix On Demand).	 Triggered An email that will be triggered within DocuMatix On Demand.	 PURL An email that will be sent with a link to a PURL.
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Name



Creating a Triggered Text

Step 1

- Complete the message details as you normally would when creating a triggered email. Click Continue to move into the email editor.

Tell us about your new triggered email campaign.

Name

Description

ExecuTrax Initiated

Is notification campaign

Store your email in a folder
Retrieve your email at a later date by saving it to a folder of your choosing

Would you like to use the DocuMatix Editor or would you like to import HTML instead?
Typically, third party agencies, and/or developers code emails to provide extra functionality we simply do not offer in a prebuilt template. *This option may not be changed once you continue.*

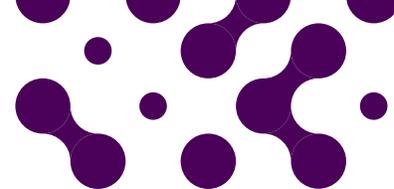
Layout mode

Step 2

- Within the editor, click on SMS View to switch to the text message setup. Begin typing your message in the textbox. This is the content your recipients will receive.

Member Portal Access

160 characters left.



Publishing a Triggered Text

Step 1

- Once your text is complete and ready to be published, navigate to the Dashboard. In the Email Drafts section, select the specific operational text, then choose Publish from the menu.
- To automate the text, continue setup in the DOD Configuration Tool. Refer to the Configuration Tool procedures for a step-by-step guide.

Step 2

- Validate the text to ensure there are no errors and that all links and images render correctly. If everything looks good, click Next to proceed.
- Any Critical Errors must be resolved before the message can be sent.

Email Validation ✕

Email name: Member Portal Access 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	

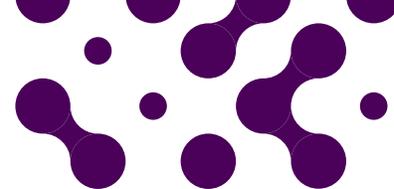
Images

No images found

Links

✓	https://gomarquis.com
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Next Close



Text Reports

Step 1

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

Step 2

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

Additional Notes

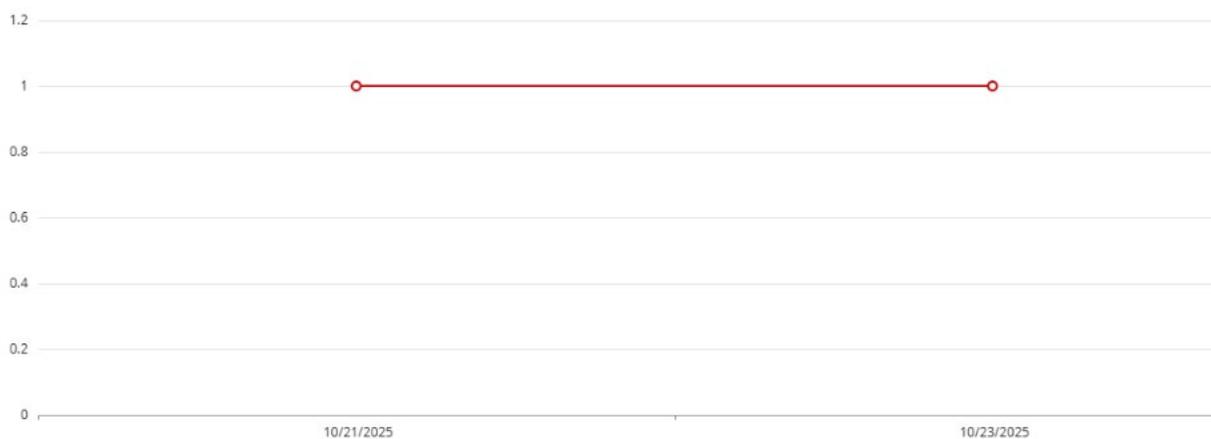
- **Subscriber Summary for Keyword**
 - Displays the total number of subscribers associated with each keyword.
- **Subscriber Opt-Ins**
 - Use the drop-down arrow to select how far back to show opt-in activity.

Subscriber Opt-ins

Graph

Subscriber Opt-ins

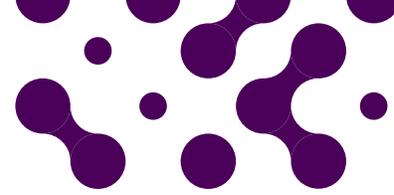
Opt-ins [last 30 days] ▾



Subscriber Summary

1,749 Total Opt-ins	205 Total Opt-outs	1,544 Total Current Subscribers
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Implementing Operational Texts



Manually Opt-Out Mobile Numbers

Step 1

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

Step 2

- 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**.

Opt-out List

Add mobile number to Opt-out list

Add

Download Opt-outs Close