Brand Registration for SMS

MOMENTUM

Why do I need to register my brand and website for SMS?

Answer: 10DLC and SMS campaign registration with The Campaign Registry (TCR) is now required by communications carriers to ensure that legitimate SMS messages reach your customers consistently and reliably. TCR registration helps carriers verify message sources (your organization), reduces spam, and ensures a high quality of SMS communication for legitimate brands. For the vast majority of businesses, adhering to the new requirements is straightforward. You are required by law to register your brand through your mobile network operator (MNO) or communication service provider (CSP) if you send any business SMS messages, even if they are one-to-one texts that do not pertain to marketing. While the exact steps will vary for businesses, registering your brand typically includes providing information such as:

- Your Company name (as registered for the IRS)
- Your business category
- Your customer opt-in process
- Federal business ID # (EIN)
- Your stock symbol and logo (as available)
- A summary of how your org uses SMS

Once your brand is approved for SMS by your service provider, you must register any standard SMS campaign types, including both one on one messages and automated campaigns. That means providing sample messages of common texts sent and your policies for users to opt-in and out. A list of numbers from which SMS messages are sent is also required to finalize registration. You can learn more about TCR's SMS brand and campaign registry HERE.

What happens if I don't register?

Answer: Without registration, your outgoing SMS messages may be blocked or filtered by carriers, meaning your customers may not receive them until you get registered and are compliant. Registering by the deadline of December 1, 2024, or beginning that process as quickly as possible thereafter, ensures continued, uninterrupted service for your SMS customer communications.

Where do I go to access the ContextRegister Portal to self-register?

Answer: Here is the link to the Customer SMS Brand Registration Portal

Click HERE to watch a short video about the registration process in the ContextRegister portal.

What do I need to prepare to complete self-registration for SMS compliance in the ContextRegister portal?

Answer: To successfully register using the ContextRegister portal, you'll need:

- Your business's full and official IRS-registered name and Federal Tax ID (EIN)
- A company/brand website. If your brand does not have a website (e.g., use a social media page or none at all), you will need to prepare for SMS compliance and submit for TCR registration using a different method.
- Administrator access to your website to add the code for an opt-in form for compliance verification.

What is a website "opt-in form" and why is it necessary?

Answer: An opt-in form is a brief sign-up form on your website where customers can agree to receive SMS communications from your brand. This form is essential to show that customers have consented to receive your messages, thus meeting TCR's compliance requirements. ContextRegister provides a quick, one-line code snippet you can easily add to your website for compliance.

Example:

```
<!-- Embed the form via iframe -->
<iframe id="formIframe" src="<https://cr.sabrhub.com/smsform.html>" width="100%" height="800" frameborder="0"></iframe>
```

How long does the registration process take?

Answer: Once you complete the necessary steps to get your website prepared for compliance and submit, the typical review and approval process takes between 48 to 72 business hours – this can take longer, depending on the volume of registrations and use case complexity. However, low-volume messaging cases that have clean/well prepared submissions generally receive faster approval times.

Can I complete the registration myself?

Answer: Yes! Registration is self-service. With ContextRegister, you can manage your own registration, track progress, and ensure compliance without needing to go through lengthy manual processes. Simply follow the step-by-step instructions on the platform to complete your registration.

How do I know my registration is complete?

Answer: You'll receive real-time notifications through ContextRegister at each stage of the process. Once your registration is fully approved, you will be notified and can begin or continue sending SMS messages.

What if my registration is rejected?

Answer: ContextRegister's automated vetting of compliance requirements helps reduce errors before submission, but if adjustments are needed post submission, you will receive notification and will have guidance for fixing the issues and resubmitting via the portal. Fix the issues and submit again. If you still experience issues, open a ticket with Momentum to let Support know about the rejection notification so the issues can be evaluated and assistance provided, if needed.

Who can I contact if I have questions as I work through the registration process in the portal?

Answer: If you need help at any stage while in the registration portal, use the **Hi There! chatbot** (bottom right) to ask questions and review the help icon pop-ups next to each field.

TCR regulated **10DLC** Brand compliance for SMS helps businesses improve the messaging ecosystem, increase deliverability, reduce spam, and enhance security. The ContextRegister portal (powered by Sabrhub) offered by your Service Provider walks you through the preparation and registration process with simple tools that help you to ensure your website's readiness for compliance, submit it for registration approval, review status updates or requests during the process so you can make necessary changes quickly, and as a result, gain compliance approval and registration more quickly.

Here is the link to the Customer SMS Brand Registration Portal for self-registration.

Basic Website Compliance Requirements

For speedy TCR SMS 10DLC website compliance approval and registration, the brand's website needs to meet some specified standards that show it is a legitimate business and respects customer privacy.
The registration and approval process looks for many legitimizing data points in a website which are listed for you during the process, including the following important items your organization may need to add or improve in preparation:

1. **Website Sitemap**

    A complete website reassures reviewers that your business is credible. Please note, a website is the fastest way to ensure registration and approval. Other options (social media page, etc.) require a different and more manual method to submit for approval. In preparation for using this registration portal, ensure your site has these essential pages with clean content:

    - ✓ Home Page
    - ✓ About Us
    - ✓ Products/Services
    - ✓ Support or Contact Us
    - ✓ Team or Staff

2. **An Opt-In Form for Customer Consent**
    Your website must include a form where customers can provide their phone number and agree to receive texts. The registration portal offers code snippets to assist you, but you should prepare for the following:

    - Ensure the phone number field is not required in your Opt In to avoid any impression of forced consent.

    - Legal Disclaimers and Opt In are included and highly visible.

        - ✓ A check box with a disclaimer stating: *"I agree to receive recurring automated text messages for marketing and customer support at the phone number provided. Message & data rates may apply. Message frequency varies. Reply STOP to opt-out.*

        - ✓ A message below the submit button stating: *"View our Privacy Policy and Terms of Service."*

3. **SMS Privacy Policy and Terms of Service**

    An SMS Privacy Policy and a Terms of Service notice must be available on your site.
    The Privacy Policy explains how customer data is used and protected when they opt In for SMS communications. And the Terms of Service clarifies customer rights and what they agree to by opting in.
    To assist you, the registration portal offers code snippets that can be used to add this important compliance requirement to your site (see below).
    The example text the code snippet adds for SMS Privacy Policy:

    - ✓ *"We use your information to send order updates, marketing offers, and review requests via SMS. We don't share your mobile information with third parties for marketing. Opt-in data and consent for messaging are never shared outside our SMS provider. To unsubscribe, reply STOP. For more information, see our Terms of Service [link]."*

    The example text the code snippet adds for SMS Terms of Service:

    - ✓ *"By subscribing to our SMS marketing, you agree to receive recurring texts, including updates, offers, and review requests, even if on a do-not-call list. Message frequency varies, and consent isn't needed to purchase. To unsubscribe, reply STOP or use the link in our messages. Carrier message and data rates may apply. We may change our messaging number at any time and aren't liable for missed messages. Your phone number is collected voluntarily and shared only with our SMS provider, not with third parties. Opt-outs may take up to 10 business days. See our Privacy Policy [link] for details."*

ContextRegister Portal **QuickComply** Code Snippet Instructions

For companies without an existing opt-in form, the registration portal QuickComply tools make it simple to meet 10DLC registration requirements with a single line of prepared code ready for you to use. This enables brands to manage opt-in compliance effortlessly and quickly.

Prerequisite:

Ensure that you have administrator access to modify your company's website (e.g., Card, Wix, SquareSpace, Wordpress, etc.) so that you may embed this code in the appropriate web page on your website.

Step 1 - Create a New Page

Set up a new page on your website, using a URL like: https://www.yourcompany.com/sms_form
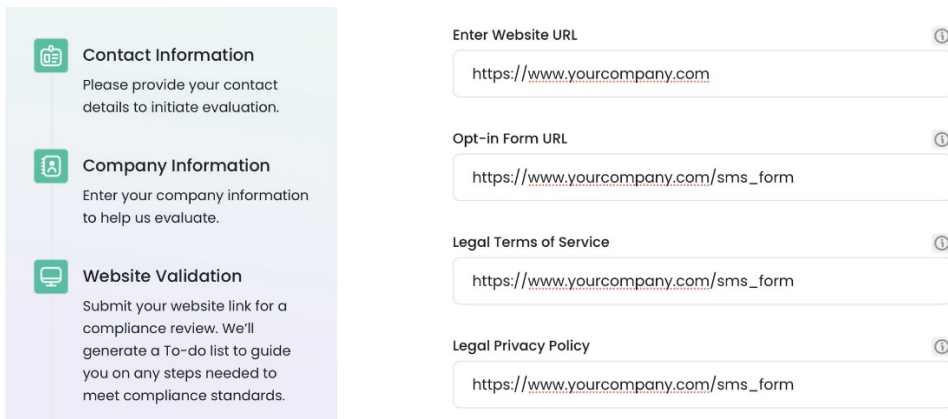
Step 2 - Embed One-Line of Code

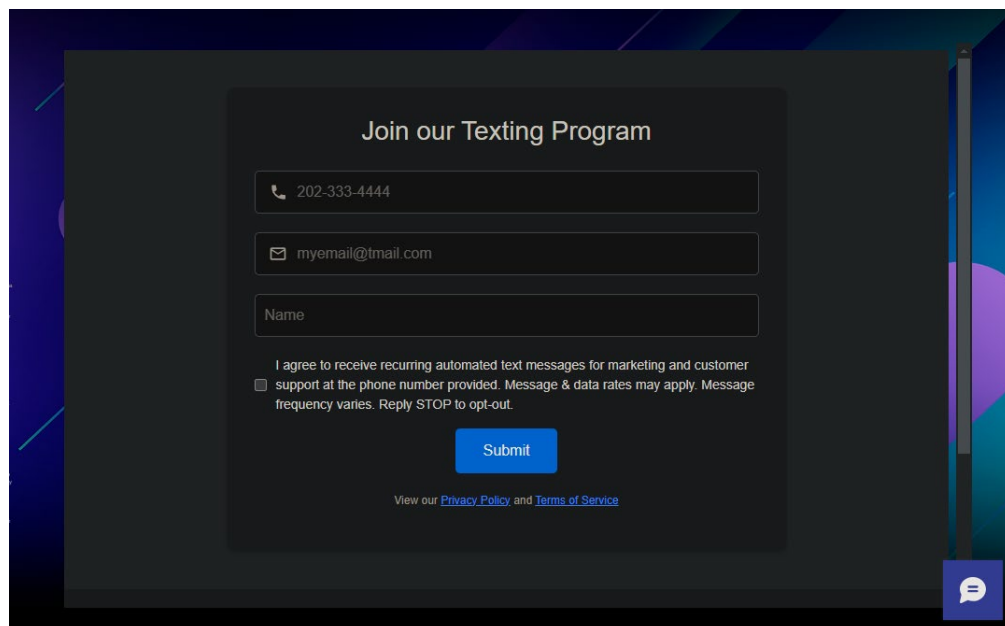Find the embed component and paste this html code there. Here is an example:

<!-- Embed the form via iframe -->

<iframe id="formIframe" src="<https://cr.sabrhub.com/smsform.html>" width="100%" height="800" frameborder="0"></iframe>

Step 3 - Revalidate / Refresh and publish the Website

Use the new SMS Opt-in URL, which includes the QuickComply code snippet, for all three fields: Opt-in Form URL, Legal Terms of Service, and Legal Privacy Policy. The legal language for Privacy Policy and Terms of Service is preconfigured within this URL, ensuring compliance across each required category.

Example web form once the 1-line code snippet has been integrated:

Step 4 - Test the Opt In form and all links in it

Use the new opt in for SMS form and ensure your site is ready to submit for registration approval.