

SMS REGISTRATION & COMPLIANCE



CLIENT **TETHER**TM
The Franchise CRM

All items must be compliant in order to enable texting in ClientTether.

REGISTRATION:

- **US Customers: Information on the telephony tab** (business name, address, etc.) **must exactly match the name associated with the EIN - not the DBA.** If it does not match, Twilio may require the company's CP 575 EIN and/or form 147c Confirmation Letter from the IRS in order to complete registration.
- Canadian customers' information must exactly match the information associated with their tax identification number.
- All customers should make sure the information submitted on the telephony tab matches exactly. **The phone number submitted in registration should follow the format +1#####.** We recommend getting your sales representative or Client Success Partner to double check in order to avoid unnecessary delays and charges.

WEBSITE REQUIREMENTS:

- **Every form on your website must have a notice to customers that they are opting in to receive automated texts, as well as information on how they can opt-out.** Here is an example - BE SURE TO ADJUST THE ITEMS IN RED FOR YOUR COMPANY:

*By submitting the form, you agree to receive calls, text messages, automated calls, or emails from **Company Name** at the contact information provided. Message rates may apply. Message frequency and type may vary. Text STOP to cancel text messaging at any time. See [Terms of Service](#) and [Privacy Policy](#) for additional details.*

• Privacy Policy:

- A compliant Privacy Policy must state that **no mobile information will be shared with third parties/affiliates for marketing/promotional purposes.**
- It must also **give information on how to opt out** of text messaging. For example, it might say:

Text STOP to cancel text messaging at any time.

QUESTIONS?



www.clienttether.com



sales@clienttether.com



385.332.8144

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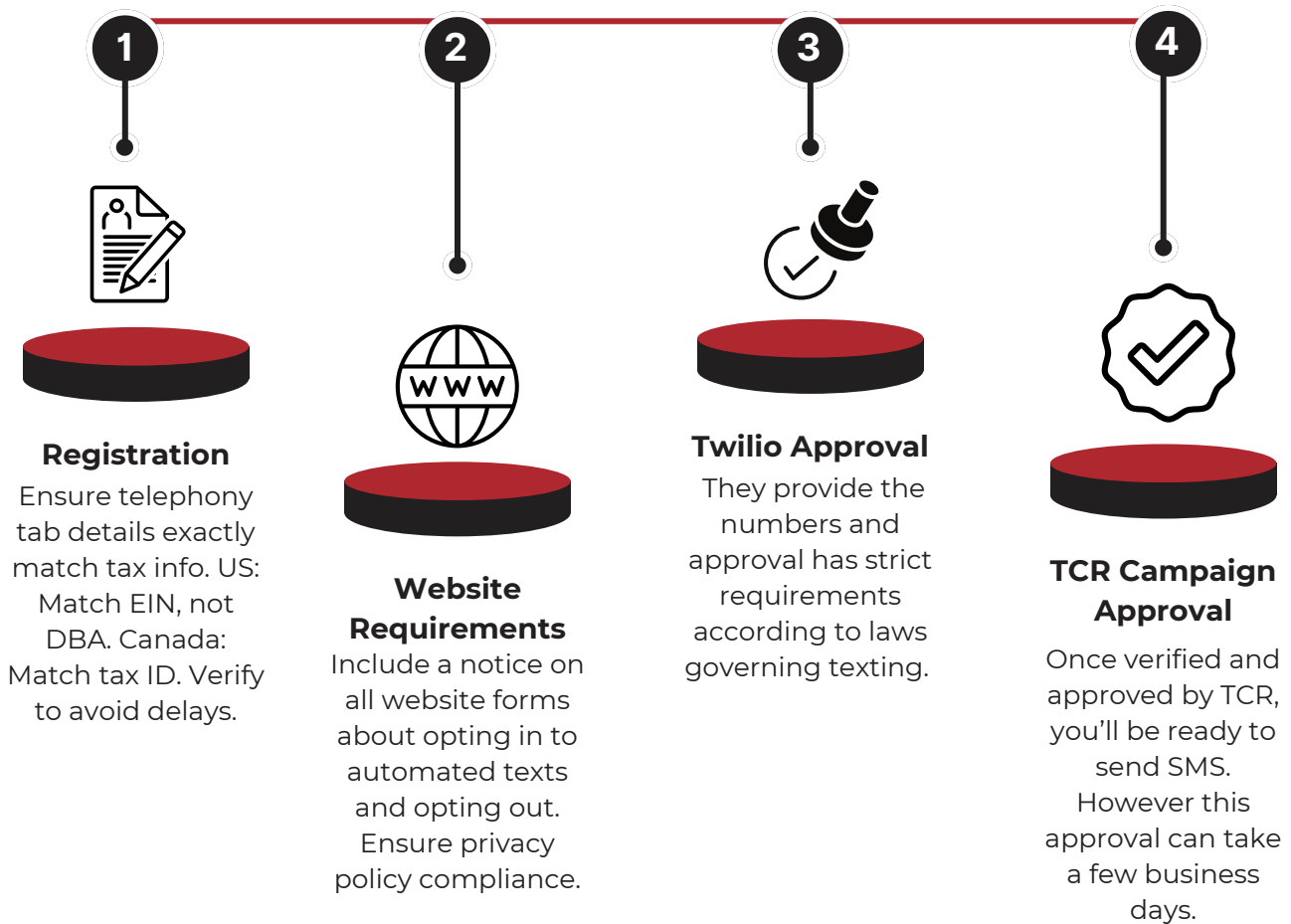


SMS PROVIDER & TCR APPROVAL

- Twilio is our contracted vendor for telephony. **They provide the numbers and approval has strict requirements according to laws governing texting.**

[Here is a link to the requirements:](#)

STEPS FOR SMS REGISTRATION APPROVAL



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