SMS REGISTRATION & COMPLIANCE

CLIENT TETHER™
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?

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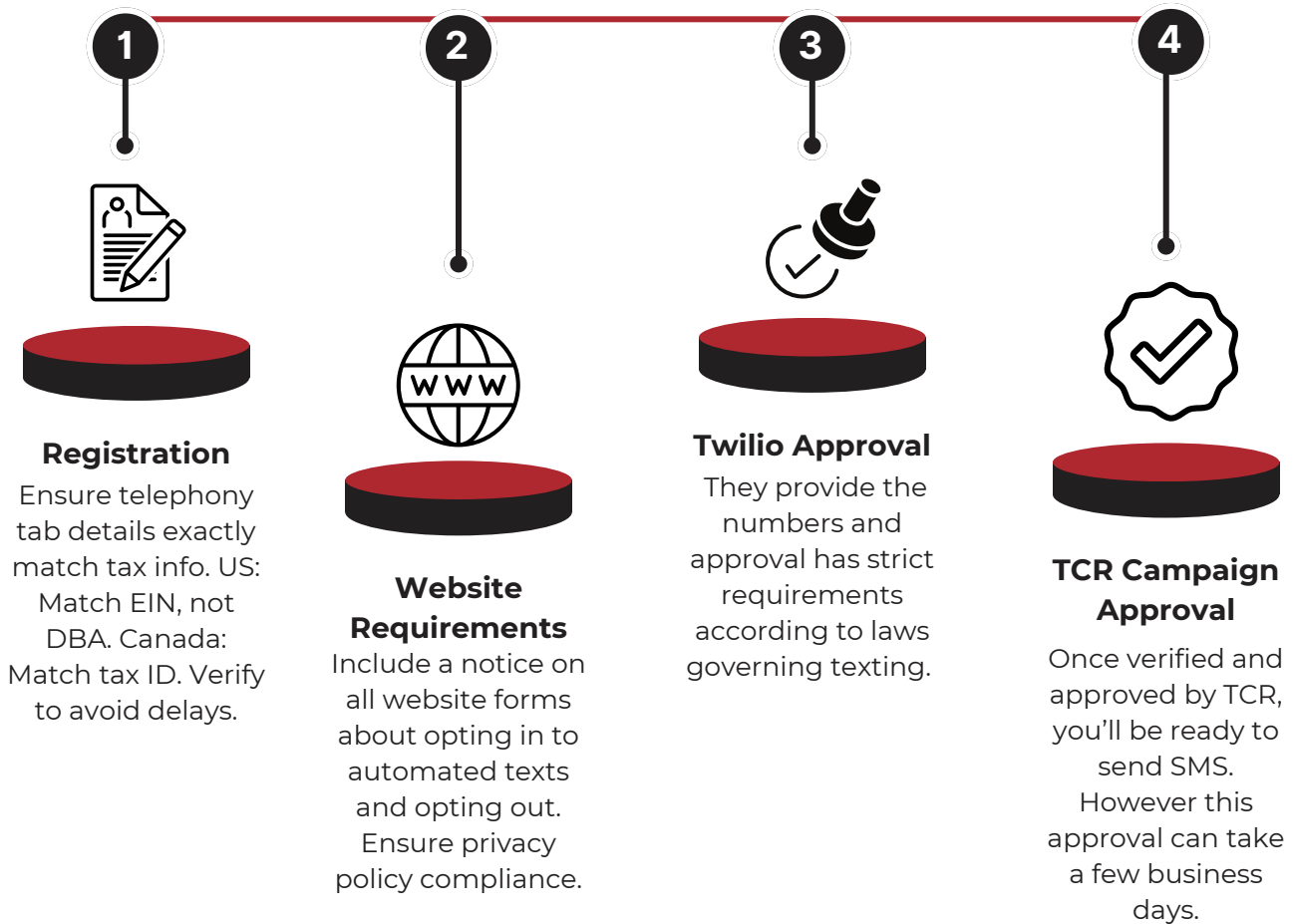
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✓ SMS PROVIDER & TCR APPROVAL

● 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

1

Registration
Ensure telephony tab details exactly match tax info. US: Match EIN, not DBA. Canada: Match tax ID. Verify to avoid delays.

2

Website Requirements
Include a notice on all website forms about opting in to automated texts and opting out. Ensure privacy policy compliance.

3

Twilio Approval
They provide the numbers and approval has strict requirements according to laws governing texting.

4

TCR Campaign Approval
Once verified and approved by TCR, you'll be ready to send SMS. However this approval can take a few business days.

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