

## **SMS Campaign Form**

Campaign Information is used to validate how the company will utilize the Messaging Service and will abide by the content they promote. All fields are required. Sample data is provided and can be used as a template for valid information.

Please carefully read all information and instructions. Complying will ensure that your campaign is created and approved in a timely manner. Please note, webpages must have a Privacy Policy that demonstrates senders will refrain from sharing information consumer data.

### **Brand**

This is general information about the company using the Messaging Service.

### **Required Information**

Company Name	
Company DBA	
Address	
City	
State and Zip	
Phone number	
Email	
Website	
Privacy Policy URL	
Terms and Conditions URL	
Tax Emp ID No EIN	

### **Vertical Type**

## Call to Action/Message Flow

This message is required as of November 17, 2022 and must provide clear, concise, and conspicuous description for the end user on how they will receive messages. This Opt-in must be One to One and cannot be shared with any third parties. This cannot be implied or obscured in the Terms and Conditions or any other agreements.

### Examples of how users opt-in for SMS messages:

- Entering a phone number through a website
- Customers opt-in by visiting [www.samplewebsite.com](http://www.samplewebsite.com) and adding their phone number. They then check a box agreeing to receive text messages from the example brand.
- Clicking a button on a mobile webpage.
- Sending a message from the consumer's mobile device that contains an advertising keyword.

Example: Consumers opt-in by texting New to (111) 222-3333.

Important: If consumers can opt-in by texting a keyword, the response should include the brand name, confirmation of opt-in enrollment to a recurring message campaign, how to get help, and a clear description of how to opt-out.

- Initiating the text message exchange in which the message sender replies to the consumer only with responsive information.
- Signing up at a point-of-sale (POS) or another message sender on-site location.
- Opting in over the phone using interactive voice response (IVR) technology.

Example: "ABC Company: You are now opted-in to our platform notifications. For help, reply HELP. To opt-out, reply STOP"

Sample messages must be unique and provide examples of content you may send so the qualifying agency can see what interactions with customers will look like. Sample messages should support the overall description of the campaign. Ideally the qualifying agency must see the identification of who is sending the message (brand name or sender name), it should not be a generic description or a generic sample message where the use case cannot be determined without additional research. Please ensure at least one sample message has Opt-Out language.

## Prohibited Content

- Any activity connected or in conjunction with adult entertainment.
- Any hate speech, or otherwise engaging in threatening, abusive, harassing, defamatory, libelous, violent, deceptive, or fraudulent behavior.
- Content related to the sale or promotion of any substances that are classified as illegal or controlled substances. Even if they are not directly related to the campaign.

## Prohibited Campaigns

- Third-party or affiliate lead and/or commission generation (see definition below)
- Advertisements for loans
- Credit repair offers
- Debt relief
- Debt consolidation
- Debt collection
- Work from home, secret shopper, MLM, or other similar advertising campaigns

# Campaign Registration Information

## Standard Campaign Types

**2FA:** Any authentication, verification, or one-time passcode.

**Account Notification:** Standard notification for account holders, relating to and being about an account.

**Customer Care:** All customer interactions, including account management and customer support.

**Delivery Notification:** Information about the status of the delivery of a product or service.

**Fraud Alert Messaging:** Messages regarding potentially fraudulent activity on an account.

**Higher Education:** Campaigns created on behalf of Colleges or Universities, School Districts and educational institutions that fall outside of any "free to the consumer" messaging model.

**Low Volume Mixed:** Small throughput, any combination of use-cases. Examples includes test, demo accounts.

**Machine-to-Machine:** M2M is a process that implies wireless communication between two or more physical assets. There is no human interaction in the Machine-to-Machine campaign. Subscriber-facing campaigns are prohibited. This is a dedicated use case.

**Marketing:** Any communication with marketing and/or promotional content.

**Mixed:** Any undeclared combination of use-cases.

**Polling and voting:** The sending of surveys and polling/voting campaigns.

**Public Service Announcement:** An informational message that is meant to raise the audience's awareness about an important issue.

## Special Campaign Types

**Select Skip if you already selected a use case. Go back if not. These are not common.**

**Agents and Franchises:** Brands that have multiple agents, franchises or offices in the same brand vertical, but require individual localized numbers per agent/location/office. Post Regulation approval by MNO is required for this Use Case.

**Carrier Exemptions:** Exemptions by carrier! Post-regulation approval by MNO is required for this use case.

**Charity:** Communications from a registered charity aimed at providing help and raising money for those in need. 501c3 Tax-Exempt Organizations only. Post-regulation approval by MNO is required for this use case.

**Emergency:** Notification services designed to support public safety/health during a natural disasters, armed conflicts, pandemics and other national or regional emergencies. ! Post-regulation approval by MNO is required for this use case.

**K-12 Education:** Campaigns created for messaging platforms that support schools from grades K-12 and distance learning centers. This is not for Post-Secondary schools. This use case requires approval from at least 1 MNO.

**Political:** Part of organized to influence decision making of a specific group. All campaigns to be verified. Only Federal Campaigns! Only pre-vetted Brands are eligible for this Use Case.

Please register at [www.campaignverify.org](http://www.campaignverify.org) and select "Import Vetting" on the Brand Details page.

**Proxy:** Peer-to-peer app-based group messaging with proxy/pooled numbers. Supporting personalized services and non-exposure of personal numbers for enterprise or A2P communications. ! Only pre-vetted Brands are eligible for this Use Case.

**Social:** Communication within or between closed communities (For example, influencers alerts). Only pre-vetted Brands are eligible for this Use Case.

**Sole Proprietor:** This is for Sole proprietors only.

**Sweepstakes:** All sweepstakes messaging. Only pre-vetted Brands are eligible for this Use Case. Platform Free Trial: Platform Free trial offers with strict controls and MNO audit rights (MO opt in). Only pre-vetted Brands are eligible for this Use Case.

**UCaaS High Volume:** UCaaS companies provide cloud delivery communications services for businesses. Each number assigned to a UCaaS campaign is typically assigned to a different employee of that business and the use cases are varied. This use case is not for any API/automated driven communication. This is for UCaaS campaigns that require higher volume. This use case is only available to approved UCaaS Businesses.

**UCaaS Low Volume:** UCaaS companies provide cloud delivery communications services for businesses. Each number assigned to a UCaaS campaign is typically assigned to a different employee of that business and the use cases are varied. This is for UCaaS campaigns that require higher volume not for any API/automated driven communication. This use case is only available to approved UCaaS Businesses.

## Campaign Details

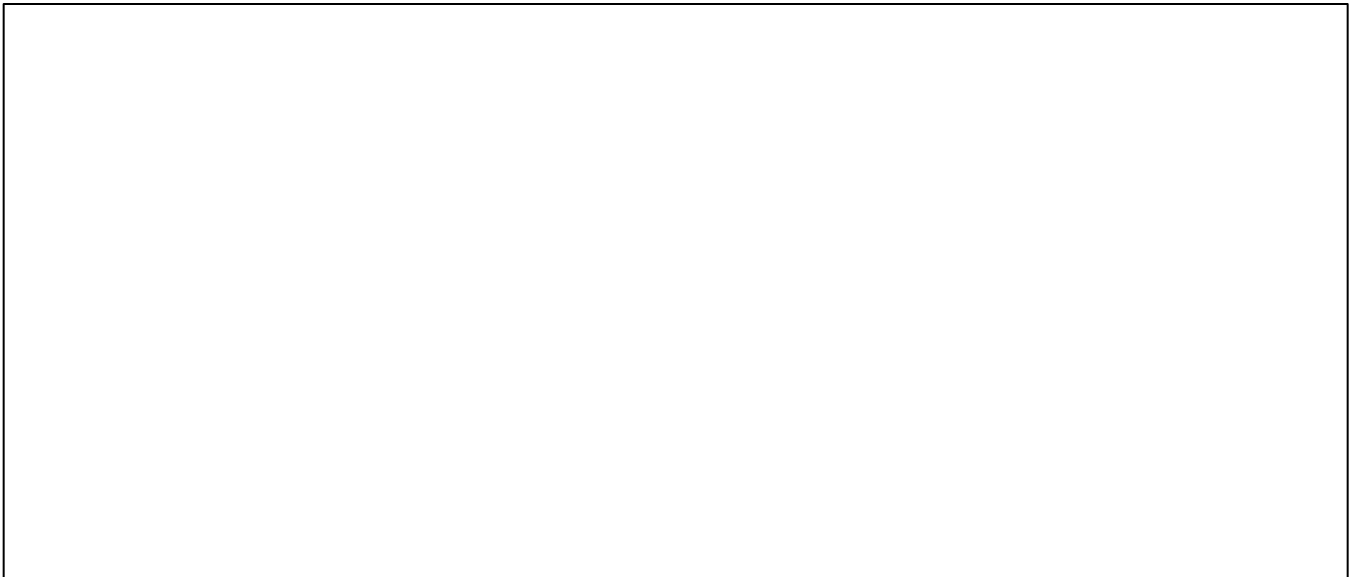
**Campaign Description:** Describe what you will be sending to your customers and how often you will be sending SMS messages.

**Call-to-Action / Message Flow:** Please describe how you will collect information and obtain permission to SMS text your customer. If you a paper form is used for obtaining numbers and consent, please provide a copy.

**Sample Message 1: Please be sure to add the opt out and help at the end of messages.**

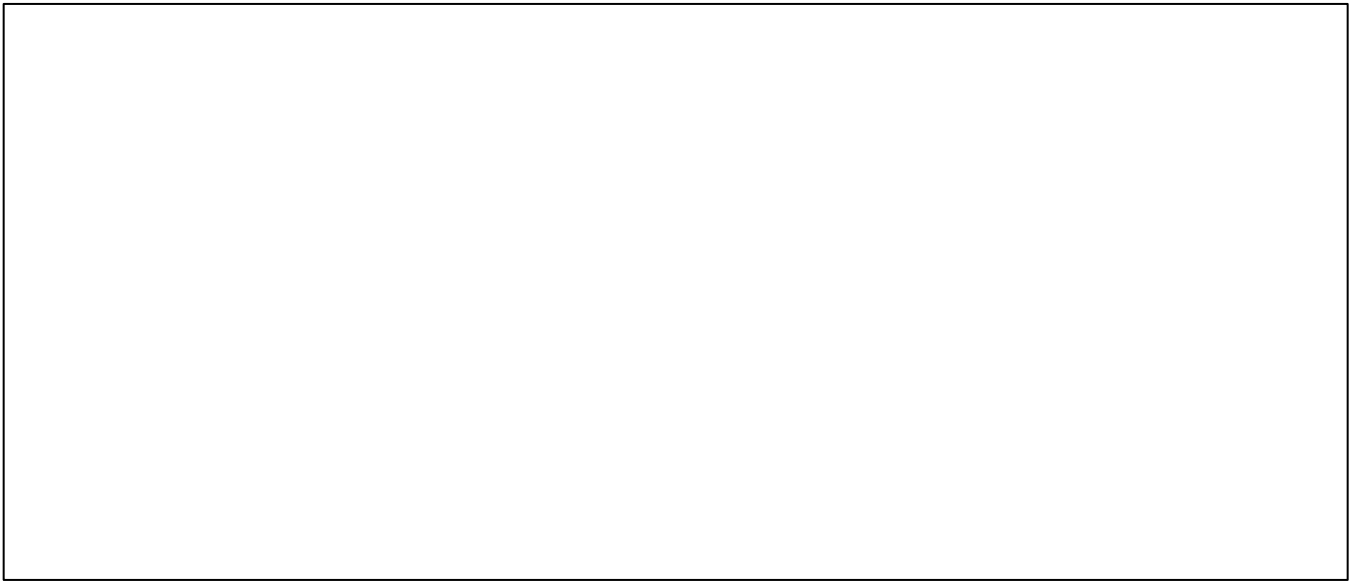
A large, empty rectangular box with a thin black border, intended for the content of Sample Message 1.

**Sample Message 2: Please be sure to add the opt out and help at the end of messages.**

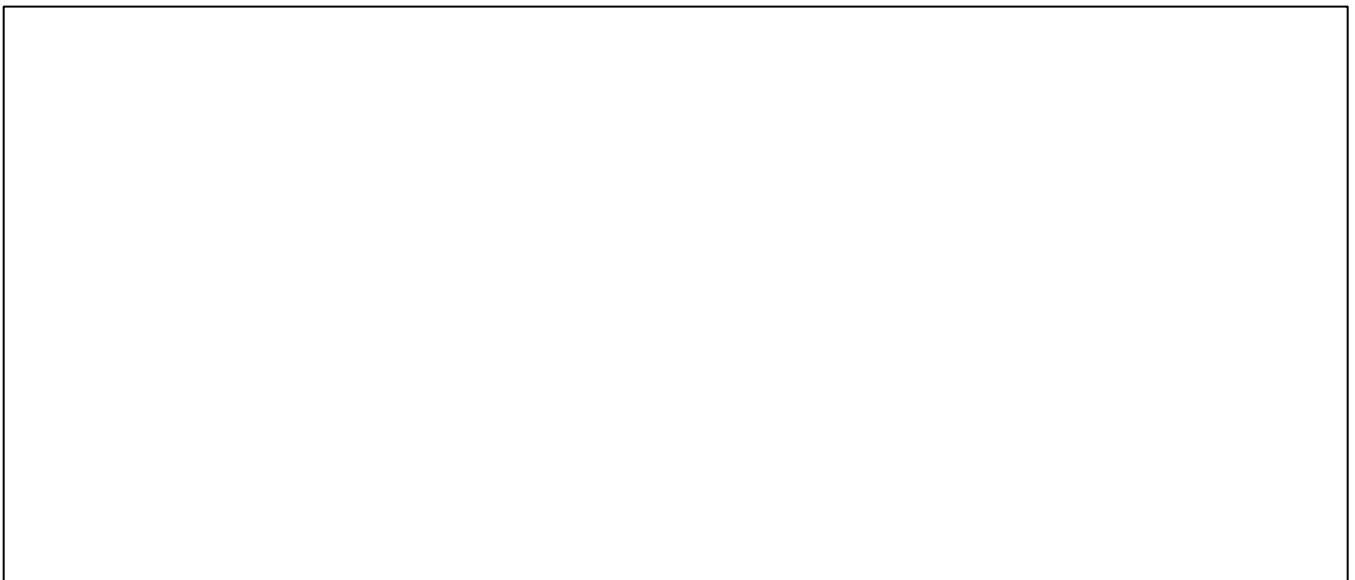
A large, empty rectangular box with a thin black border, intended for the content of Sample Message 2.

## Campaign and Content Attributes

Opt-out Message:

A large, empty rectangular box with a thin black border, intended for the user to enter the opt-out message.

Subscriber Help:

A large, empty rectangular box with a thin black border, intended for the user to enter subscriber help information.

**Number Pooling**

**Direct Lending or Loan Arrangements**

**Embedded Link**

**Embedded Phone Number**

**Age-Gated Content**