Brand Registration for Webex SMS



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

Answer: 10DLC / SMS campaign registration and continued compliance with The Campaign Registry (TCR) is now required by communications carriers to meet federal regulations and 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 per business, registering your brand typically includes providing:

- Your Company/DBA name (as registered for the IRS)
- Your business category
- Privacy Policy | Customer opt-in opt/out method(s)
- 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 one-on-one messages and automated campaigns with the Carrier and TCR by 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 with approval. 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 underlying Carriers, meaning your customers may not receive them until you get registered and are compliant. The initial registration deadline was December 1, 2024. Beginning the compliance registration process as quickly as possible is the best way to ensure continued uninterrupted service for your p2p and business-to-customer SMS communications.

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

Answer: Once you have your license, use this link to go to the <u>Customer SMS Brand Registration Portal</u> Click HERE for a short video intro to the brand registration process via 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. The ContextRegister portal provides a quick and easy one-line code snippet you can add to your website for compliance.

How long does the registration process take?

Answer: Once you complete the necessary steps to get your website prepared for compliance and submit, the review and approval process begins – an initial response to your submission will be returned via the ContextRegister portal with feedback or suggested fixes within 3 business days. Next you will submit for manual comprehensive Carrier review and approval, and then to TCR for final manual review and approval. This process takes time and is dependent on the comprehensiveness of your submission, the volume of registrations, and SMS use case complexity. However, low-volume messaging cases that have clean/well prepared submissions generally receive faster Carrier approval times overall. Please Note: Momentum Telecom has no control over the 10DLC self-registration and approval process for brands or campaigns, or how quickly approvals may be received once submitted.

Can I complete the registration myself?

Answer: Yes! You actually need to, and with ContextRegister you now have access to review and manage your own registration, track progress, and ensure compliance approval in one place without needing to go through the normal and far more time-consuming manual processes. Simply log into the ContextRegister portal to submit, track status updates, and follow any instructions or feedback in the portal to complete your registration tasks for quicker Carrier approval.

How do I know my registration is complete?

Answer: You'll receive real-time notifications through ContextRegister at each stage of the process. You should be checking the portal routinely for updates. And once your registration is fully approved, you will be notified in the ContextRegister portal.

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 with guidance for resolving the issues and resubmitting via the portal. Fix the issues and submit again. If you still have issues, also open a support ticket with your Service Provider to let them know about the rejection notification so the issues can be evaluated for assistance requests.

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. You also have access to contact the ContextRegister experts from within the portal to ask questions or get guidance.

SMS Brand Compliance: Website Preparation



TCR regulated **10DLC** Brand compliance for SMS helps businesses improve the messaging ecosystem, increase deliverability, reduce spam, and enhance security. The underlying purpose of both the U.S. regulatory and telecommunication carrier industry rules that govern businesses' and organizations' use of SMS to communicate with users is to ensure that people do not receive SMS communications that they do not want to receive and only receive SMS communications they do want to receive from businesses or organizations.

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 Brand Approval more quickly and then report your SMS campaigns to remain in compliance.

Basic Website Compliance Preparation

For speedy TCR SMS 10DLC website compliance approval and registration, the brand's website needs to meet some <u>Carrier specified</u> 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. The most up-to-date standards are listed for you during the process of submission for approval in the ContextRegister portal. Some general items your organization may want to check, add, or improve as part of your preparation could include:

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 (or this information) with clean content:

√ Home Page

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

2. An Opt-In Form and Opt Out options to ensure Customer Consent

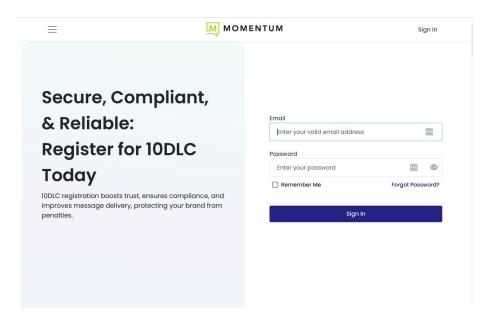
The Carrier expects your website (and SMS messages) to include a form or the ability for customers to provide their phone number and <u>agree</u> to receive texts. The registration portal offers code snippets to assist you, but you should prepare for the following to be demonstrated in your submission:

- Check your Opt In form, Opt Out options, and messaging to avoid any impression of forced consent.
- Legal Disclaimers and Opt In/Out methods are included and highly visible to customers.

3. SMS Privacy Policy and Terms of Service

Carriers / regulations also require an SMS Privacy Policy and a Terms of Service notice to be available to customers 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 ContextRegister portal also offers compliant code snippets for these important customer aids, should you need them for your site.

Once ready, here is the link to the <u>Customer SMS Brand Registration Portal</u> to self-register.



The Carriers and TCR grant or deny approvals. Momentum Telecom has no control over the 10DLC self-registration and approval process for brands or campaigns or how quickly approvals may be received. The regulation compliance examples offered here may be updated by the regulatory bodies at any time and the information should not be relied upon as final or as advice - legal or otherwise. Consult legal counsel for terms or policy statement assistance.