GENESYS

Hello Genesys Customer!

In light of recent regulation changes, please take time to review the information and make sure your business has made any necessary changes prior to submitting your registration form to ensure a faster and smoother wireless carrier approval.

Any missing or inaccurate information will significantly delay the submission and potentially deny approval by the Wireless Carriers.
Failing to meet the following will result in a rejection from the carrier or request for changes prior to resubmission.

Check out our Q&A video on SMS registration on YouTube
SMS | Genesys Cloud Community Q&A Show (youtube.com)

Brand Registration

Please make sure your tax ID matches your company name and address.

Use case

Tell us all business use cases you are utilizing SMS for. The more detail the better, full transparency is recommended as carriers continue to audit SMS compliance and content after approval.

- There are use cases that will be automatically rejected and ineligible for resubmission Sex, Hate, Alcohol, Firearms, Tobacco, Gambling, Cannabis, Debt Reduction Programs, and Third-Party Collections. For more information see, SMS best practices for a compliant program.

Message Content
We are looking for exactly what your outbound text messages say. *Even if these messages vary because they are interactive conversations, we still need examples of outbound messages.* Please include your company name, "reply STOP to opt out," and any hyperlinks, or call back numbers if applicable. For example:
- *"Hello 'Customer Name' this is Genesys Cloud reminding you of your appointment on 3/20/2023 at 1:00pm. Reply C to cancel or Y to confirm. Reply STOP to opt out."*
- If the texts are in response to a consumer texting you and the interactions are conversational, you could send an initial text *"Thank you for contacting Genesys Cloud. How can I help you today?"*

Message Volume

How many outbound messages you anticipate sending per month. 10DLC numbers support one message per second and TFN's support sending three message per second.

SMS Consent to Opt In

Call to Action (CTA) for opt in is a requirement by Wireless Carriers. Guidelines also follow the CTIA, not only the TCPA. As fraud, spam, deceptive opt in, and harassment has increased through the SMS channels, Wireless Carriers expect all compliance requirements be met for approval. Wireless Carriers govern final approval on who they permit to use their product.

- All use cases require CTA for proof of how opt in is obtained by end users, which includes a screenshot.
- Dev/test accounts- End user/tester will have to initiate the first text.
- Internal use only and non-customer facing use cases you can create an internal document collecting employees' consent to SMS.
- Numbers not in production yet you can provide a mockup of your intended opt in.
- Company provided phones still need to collect employee consent.
- Federal government, non-customer facing, legal, and health related SMS interactions all require opt in.

SMS Consent/Opt in Compliance

- Fee disclosure (e.g.,"Message and data rates may apply")
- Service delivery frequency or recurring messages disclosure. (e.g., "Message frequency may vary.")
- Opt-out instructions (e.g., "Text STOP to cancel")
- Link to Privacy Policy describing SMS will not be shared with third parties.
- Link to SMS Terms and Conditions describing terms of service
- Checkbox option that end-users must select to receive SMS messaging and separated from other forms of contact such as voice, email, automated dialer, etc. (Checkboxes cannot be pre-selected)
- Consent cannot be obtained via SMS. Consent must be obtained prior to sending a single text.
- Opt in and privacy policy verbiage cannot state information will be shared with third parties or affiliates.

Terms and Conditions

The carrier is requiring terms and conditions along with your opt in. For more information on compliant terms and conditions see, [SMS mobile terms of service and privacy policy examples](#).

- Opt in method should be decided internally based on what's best for your business. Genesys SMS team is here to educate our customers and do our best to set you up for a successful SMS program. Compliance requirements for approval have been a revolving door for long codes. We are encouraging Genesys Cloud SMS application users make the necessary changes to meet compliance needs prior to submitting your form so your SMS program will not face any rejections, filtering, shutdowns, or consumer complaints.

Explanation of Opt In Methods

- **Keyword**: A consumer can text one of the numbers with a keyword initiating interaction. We would need to know how customers came across that keyword, such as a billboard, in the branch/office, website, etc. Please provide us with the keyword.
- **Agent**: If an agent verbally collects consent, we will need an agent script, it should also be documented in a CRM, system of record, customer file, etc.
- **Website**: Your website collects consent to receive SMS. Website must include the SMS Terms of Service and Privacy Policy linked within the opt in language.
- **Consumer/End User Initiated Only**: Please tell us how you let customers know they can text your number to initiate interactions.
- **Documentation:** A signed document that specifically states they are consenting to receive SMS communication. Consent is not a condition of purchase. Although the customer provides a phone number when doing business with you, the verbiage still needs to clearly request SMS as a means of communication.
- **IVR**: The IVR script must be provided.

Examples of CTA- Proof of Opt-In

We need a screenshot or document showing what the customer sees or hears when they opt in to SMS consent.

Verbal/Agent/CRM:

Agent/IVR Script:

- Thank you for contacting {Business Line} Customer Support. With your permission, we will send you a text message which will include your ticket information in addition to your being able to respond to it with pictures of the damage.

  Message and data rates may apply. Message frequency will vary based on request.

  Mobile carriers are not liable for delayed or undelivered messages.

  This is not a subscription service, but you can opt out of texting at any time by sending the word STOP.

- For help with texting, reply with the word HELP or call us at {Business Line Phone}.

  Our program terms and conditions and privacy information can be found at https://www._____.com/termsofuse.html

  Would you like to receive a text message to continue the conversation?

CRM Where SMS Opt-In is Tracked:

General Data

ID:	
* Description:	Test Failure Pop
Account:	Stephen Bryant
SMS Requested:	☐

Reference Objects

Website:

Would you like to receive SMS notifications from **ABC Co.** about this rental?

◉ Yes, I would like to receive text messages about this rental to the phone number on this reservation

◯ No

By selecting "Yes" above, message and data rates may apply. Message frequency varies and depends on the activity of your reservation. You can opt out by responding STOP at any time. For more information, please review our Privacy Policy ⬈ and SMS Terms ⬈. If you choose not to receive text messages, we will give you a courtesy reminder call 1-2 days prior to your reservation. **Text HELP to xxx for help**

☑ Sign up for **ABC Co.** Email Specials

By selecting this box, you would like to receive email promotions, surveys and offers from **ABC Co.** Note that your email interactions can be used to perform analytics and produce content & ads tailored to your interests. Please understand that there is no charge and that you can unsubscribe at any time by (i) using the links provided in the emails or (ii) contacting us. Please consult our Privacy Policy ⬈ and our Cookie Policy ⬈ to find out more.
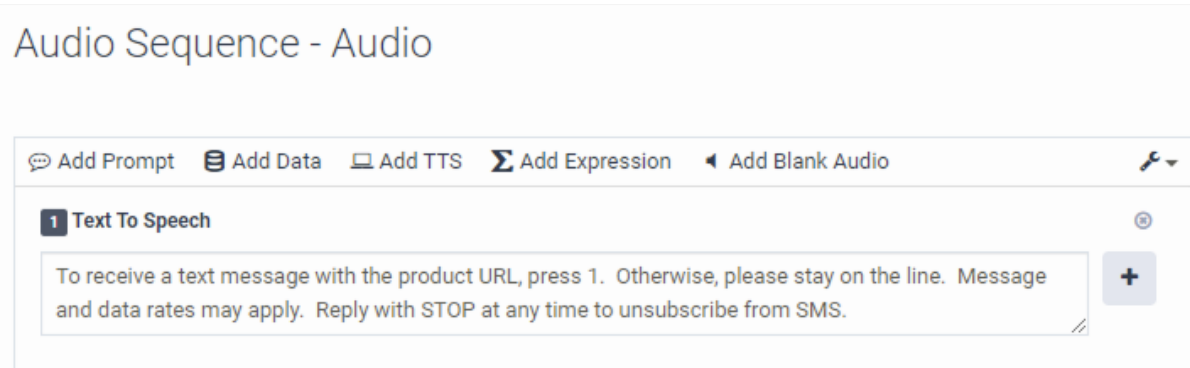
Customer Initiated: Website

Contact Us

Our Customer Service is available at: 1-800-▓▓▓▓
Mon-Thur: 9 am-6 pm ET;
Fri: 9 am-5 pm ET.

🔍 Search FAQ

🎧 Customer service 1-800-▓▓▓▓

📱 Text us at 972-▓▓▓▓ (972-▓▓▓▓)**

💬 Live Chat* with one of our agents

✉ e-mail us at ▓▓▓▓▓▓▓▓

* Logged in users only
** Message and data rates may apply.

IVR:

Bulk reason: If you are submitting more than five numbers for the same use case, please substantiate with a proper reason. The carriers request this information from us.

Again, these are just examples to help guide you on the level of detail we need to submit your form. It is ultimately up to the carrier if they approve or deny your registration application. Any compliance related matters such as exact verbiage and obtaining SMS consent should be decided on with your legal counsel and your partnering companies.