Here are some tips on completing the verification form. Please take the time to review this and let us know if you have any questions. <u>As a reminder, if there is any missing information this would delay the submission process. We need all of the requested information in order to submit your registration form.</u>

Use case: Tell us what business case you are utilizing SMS for. The more detail the better, help us understand your business. Documenting "customer service" or "marketing" will be too vague. Please avoid company jargon.

For example:

- COVID home test kits to help educate consumers on community resources.
- Communicate with consumers about account details such as account balance, delivery status, etc. to alleviate high call volume and hold times.
- 2 factor authentication for security purposes.
- Appointment reminders for customers.
- Internal communication amongst employees.

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 what you send.* Please include hyperlinks and call back numbers if applicable. It is recommended your company name is in the text, so consumers are aware of who they are interacting with.

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. 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 1 message per second and TFN's support sending 3 message per second.

Explanation of opt in: The carriers require SMS consent is obtained from anyone prior to sending them a text. The consent should specifically state they are agreeing to SMS/text. There are multiple ways you can obtain consent.

- **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 it should be documented in a CRM, system of record, customer file, etc.
- **Website:** Your website collects consent to receive SMS.
- **Customer Initiated:** 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 state SMS as a means of communication.
- **IVR**: The IVR says to receive a text press "1."

**Sending a text message as a means to collect consent is prohibited.
**Consent cannot be transferred from one business to another.
**Opt in methods require all disclosures be shared with consumers.

See Terms of Service and Privacy Policy examples here.

Proof of Opt-In- We need a screenshot or document showing what the customer sees or hears when they opt in to SMS consent. If it's an agent or IVR you can share the agent script, CRM showing documented consent, or screenshot of IVR workflow. For legality reasons the verbiage for opt in should be discussed with your internal legal consultant, but consumers need to be aware they are agreeing to receiving SMS specifically.

Examples:

CRM/System of Record:

Website:

GET PRICING

By clicking "Get Pricing," I give my electronic signature and consent that [____] may contact me with offers at the phone number above, including by text message, email, autodialer or prerecorded message. Consent not required for purchase. Message & data rates may apply. Promotions are subject to local service pricing, and may not apply to some services.
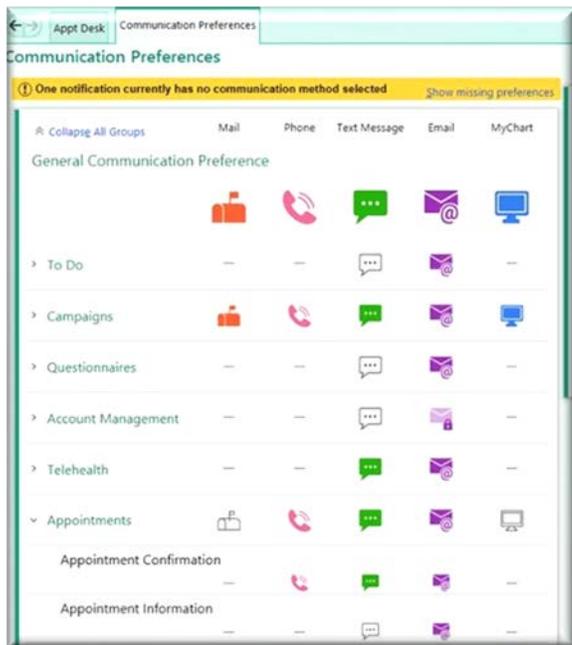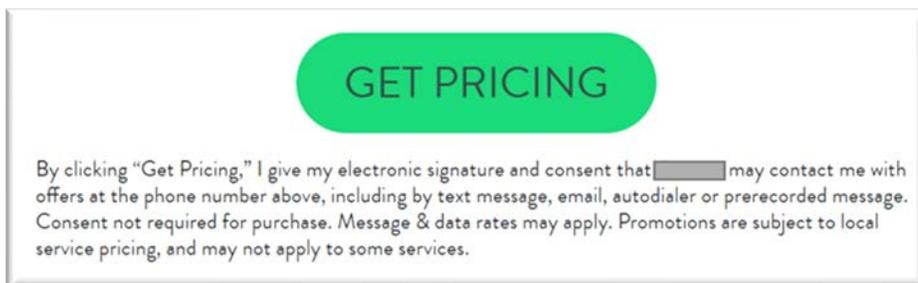
- STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT: The customer will no longer receive messages from the number they were texted from
- START, YES, UNSTOP: The customer can start receiving messages again
- HELP, INFO: The customer receives information about opt in and out messages

Customer Initiated: Website

Questions?

support@[____]com   1.800.483.[____]

[____].com/business   SMS 816.759.[____]

IVR:
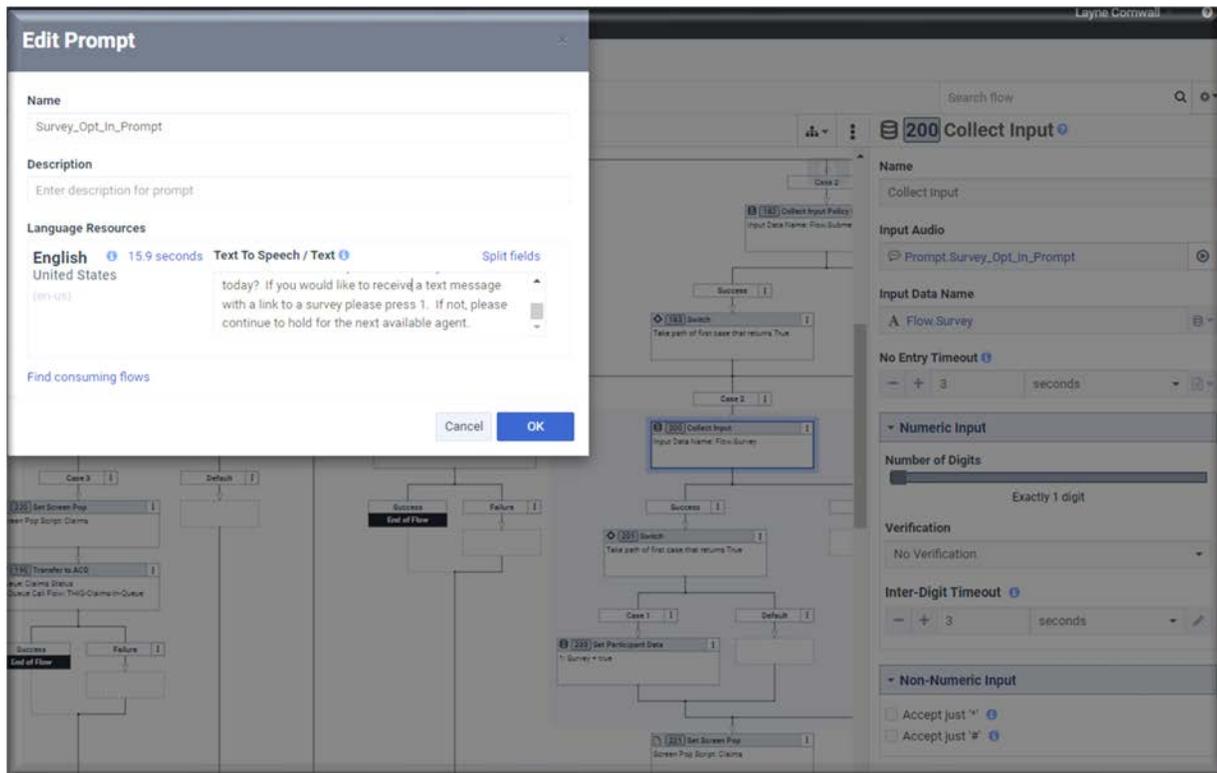
Bulk reason: If you are submitting more than 5 numbers for the same Use Case please explain why you need more than 5 numbers. The carrier's request this information from us.

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. Please review SMS best practices for a compliant program - Genesys Cloud Resource Center (mypurecloud.com) for more compliance related details.

Example:

SMS Number	Use Case Scenerio	Opt In Method	Mthly Volume	Sample Message Per Use Case
"+1 ▦ 300 0207"	When calling an IVR, Caller is invited to confirm his mobile number to receive an SMS with url in order to redirect him on customer website instead of the contact center	IVR	100000	"Thank You for contacting ▦ Technical Support. Please go to ▦.com/callme to sign in and create a call me request."
"+1 ▦ 629 1501"	When calling an IVR, Caller is invited to confirm his mobile number to receive an SMS with url in order to redirect him on customer website instead of the contact center	IVR	200000	"Thank You for contacting ▦ Technical Support. Please go to ▦.com/callme to sign in and create a call me request."
"+1 ▦ 990 7256"	When calling an IVR, Caller is invited to confirm his mobile number to receive an SMS with url in order to redirect him on customer website instead of the contact center	IVR	1000	"Thank You for contacting ▦ Technical Support. Please go to ▦.com/callme to sign in and create a call me request."
"+1 ▦ 600 6375"	When calling an IVR, Caller is invited to confirm his mobile number to receive an SMS with url in order to redirect him on customer website instead of the contact center	IVR	1000	"Thank You for contacting ▦ Technical Support. Please go to ▦.com/callme to sign in and create a call me request."
"+1 ▦ 600 6350"	When calling an IVR, Caller is invited to confirm his mobile number to receive an SMS with url in order to redirect him on customer website instead of the contact center	IVR	1000	"Thank You for contacting ▦ Technical Support. Please go to ▦.com/callme to sign in and create a call me request."