



US SMS-TCR Tips and Tricks

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Environmentally friendly Canadian manufacturer

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Calgary Heritage Roasting Co.
Owners, Jamie Parker & Mike Wenzlawe
Calgary, AB
#StandWithOwners winner

Three types of text messages to the US

Conversational

“Hey how are you?”

Implied or any form of express consent

Consent is implied if a recipient messages you first, or if the recipient tells you they wish to receive messages from you either verbally or in writing.

Informational

“Your delivery is on its way”

Any form of express consent

Consent can be granted either verbally or in writing and should be logged. Messages must contain opt-out language.

Promotional

“Save 10% this week”

Express written and logged consent

Consent must be in written form and must be logged/ saved as evidence of recipient opt-in. Messages must contain opt-out language.

A TCR request is required to send any text message to the US after December 1st. Even conversational messages will be blocked if the customer doesn't have an approved TCR registration

Web Presence required

All businesses registering for a TCR Campaign, regardless of campaign type are now **expected to have some sort of web presence**. This can be a company website, or an established company Facebook page. **Businesses that do not provide evidence of a web presence will likely be rejected.**

Website forms

If their website has a contact form that asks for a phone number, an optional SMS opt-in checkbox should also be present. Having forms that collect phone numbers but do not contain SMS opt-in will likely result in their campaign being rejected.



Website Required Error

Your website form must include a phone number field and the checkbox for SMS consent should be unchecked by default and not required. Any website with a contact form requesting a phone number must include an SMS opt-in checkbox. Campaigns with forms that collect phone numbers but lack an SMS opt-in option will be rejected. They will also be rejected if the opt-in option is required to submit the phone number. NOTE: The SMS opt-in checkbox must not be pre checked or

Unfortunately, your SMS TCR registration was rejected for the following reason(s):

- **Opt-In language required on website if its intake form is used to collect phone numbers**

☐ By checking this box, you agree to receive SMS text messages from [REDACTED] Reply STOP to opt out at any time. Reply HELP for Customer Care Contact Information. Messages and data rates may apply. Message frequency will vary.

Privacy Policy

Businesses are now required to link to a privacy policy from their website, regardless if they are collecting phone numbers on their webpage.

The privacy policy must clearly, in an easily understandable way inform consumers what personal information is being collected, how it is used, and how it is being shared.

The policy must also be clear that SMS opt-in or phone numbers for the purpose of SMS are not being shared. **If this is not clear, the registration will be rejected.**



Privacy policy and Terms and Services example

For all methods of obtaining consent, you must provide a link to your privacy policy that includes:

- A clear statement indicating the information obtained as part of the SMS consent process won't be shared with third parties.
- How your consumer information is used, collected, and shared.

The terms of service section within the privacy policy or set up as a standalone page must include:

Information on the types of messages the recipient can expect to receive.

Examples:

Customers and Guests: Updates regarding your orders, deliveries, or other relevant information.

Job Applicants: Information about your application status, onboarding materials, or other employment-related updates.

Standard messaging disclosures:

Messaging frequency may vary.

Message and data rates may apply.

You can opt out at any time by texting "STOP."

For assistance, text "HELP" or visit our [Privacy Policy URL] and [Terms of Service URL].

SMS Consent and Terms & Conditions

SMS Consent and Terms & Conditions

- Information obtained as part of SMS consent will not be shared with third parties or affiliates.
- If you have consented to receive text messages from [REDACTED], you may receive texts about your order or delivery (for guests and vendors), or if you have applied for employment with [REDACTED], you may receive text messages about your application for employment. Message rates may apply and messaging frequency may vary. You may opt-out at any time by texting, STOP. For additional assistance, text HELP or review our privacy policy [https://\[REDACTED\]/privacy-policy/](https://[REDACTED]/privacy-policy/)

Compliant Privacy Policy is Required

A compliant privacy policy must clearly explain how information is collected and used. It should explicitly state that any information gathered for SMS consent, including phone numbers, will not be shared with third parties or affiliates.

Error:

- **Compliant privacy policy is required on website.**

SMS Consent and Terms & Conditions

- Information obtained as part of SMS consent will not be shared with third parties or affiliates.
- If you have consented to receive text messages from [REDACTED], you may receive texts about your order or delivery (for guests and vendors), or if you have applied for employment with [REDACTED], you may receive text messages about your application for employment. Message rates may apply and messaging frequency may vary. You may opt-out at any time by texting, STOP. For additional assistance, text HELP or review our privacy policy [https://\[REDACTED\]/privacy-policy/](https://[REDACTED]/privacy-policy/)

Allowing opt-out

Recipients have the right to opt-out of a conversational or withdraw consent at anytime.

They must be allowed to opt-out via text, using common keywords including **STOP** and **UNSUBSCRIBE**.

TELUS does not currently manage opt-outs. While many carriers and aggregators automatically block on opt-out requests, it is still the sender's responsibility to remove opt-outs from their list.



Opt-Out language missing from sample messages

Mobile carriers require opt-out language in sample messages, such as "To opt out, reply STOP."
We recommend adding this to all three sample messages.

Error:

- Opt-Out language missing from sample messages

Example #1

Dear client here is the additional information you requested. To Opt-out of SMS reply STOP

Example #2

Texting my family member. www.msn.com. To Opt-out of SMS reply STOP

Example #3

Dear client friendly reminder that our meeting is scheduled for 2PM today. To Opt-out of SMS reply STOP

Verbal Consent Script Required

If you obtain verbal consent, provide the exact script used to ask the customer to opt in. The script must be entered word for word in the text box popup that appears when you select We ask them verbally in the TCR Registration form.

For example, “Do you agree to receive conversational text messages from [Business Name]? The message frequency will vary and message and data rates may apply. Text HELP for help. Text STOP to cancel. Visit [Privacy Policy URL] for privacy policy and [Terms URL] for Terms of Service.”

Error: Unable to verify how you’re receiving consent from customers. Your call-to-action (CTA) information for customers to opt in to your brand is unclear or missing important details.

They message us first

They message us first: Describe where your customers locate your phone number(s) to contact you.

For example, advertised on a website (include website address), business card, flyer, etc. Then we reply with "By replying you are opting into SMS communications from (Brand name) Message frequency varies. Message and data rates may apply. Text HELP for help. Text STOP to cancel. Visit [Privacy Policy URL] for privacy policy."