

Enable Messaging Opt-In Policy

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Read on to learn about the available Opt-In Flows for SMS or WhatsApp.

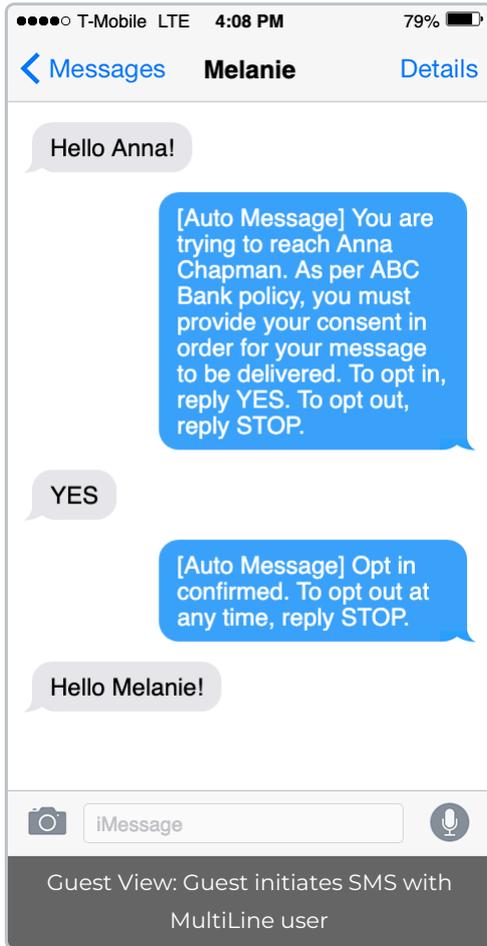
Overview

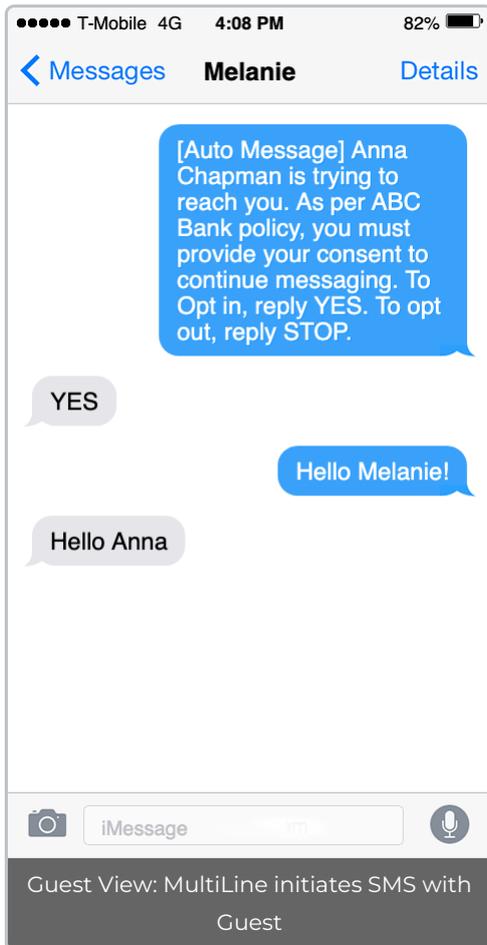
We offer two types of Opt-In flows: Opt-in with Consent and Opt-In Disclaimer.

Opt-In with Consent

This option is best to meet regulations that prior to communicating with guests using text messages, the client's consent to receive text messages is requested and captured (attestation).

- When the MultiLine user first texts a client, the client will receive a message which allows them to either opt-in to texting by replying "YES" or decline the invitation by replying "STOP" to the text conversation.
- If the client replies "YES", both the MultiLine user and the client receive an auto-generated message informing of the client's decision – and this message is recorded in the Portal/Archival System/Salesforce for compliance verification. The MultiLine user and client can now send each other text messages.
- If the client replies "STOP", the MultiLine user and client will not be able to send each other text messages.
- The automated message in all the YES and STOP cases can be configured through customizable strings.





Opt-In Disclaimer

This option is best to meet regulations that prior to communicating with clients using text messages, the client is informed they're being contacted by a business and have the ability to opt-out. This option does not require the guest to affirm consent to send messages to them.

Before you start

- If your organization did not request Opt-In capabilities, you may not see these options in the Management Portal.
- SMS Opt-in with Consent is not compatible with group messaging.
- **An admin must have "Setup" Privilege in their Role in the organization to do these instructions. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp)**
[\(<https://help.moviuscorp.com/help/what-admin-roles-mmp>\).](https://help.moviuscorp.com/help/what-admin-roles-mmp)

Enable or disable SMS Opt-In

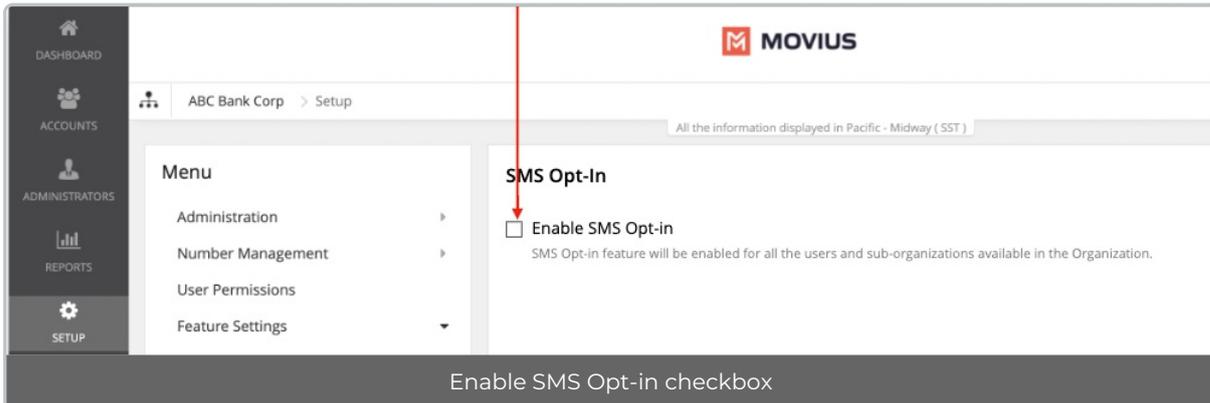
You can set up SMS Opt-In in Feature Settings.

1. Select the relevant Organization/Sub-Organization
2. Go to **Setup > Feature Settings > SMS Opt-in**

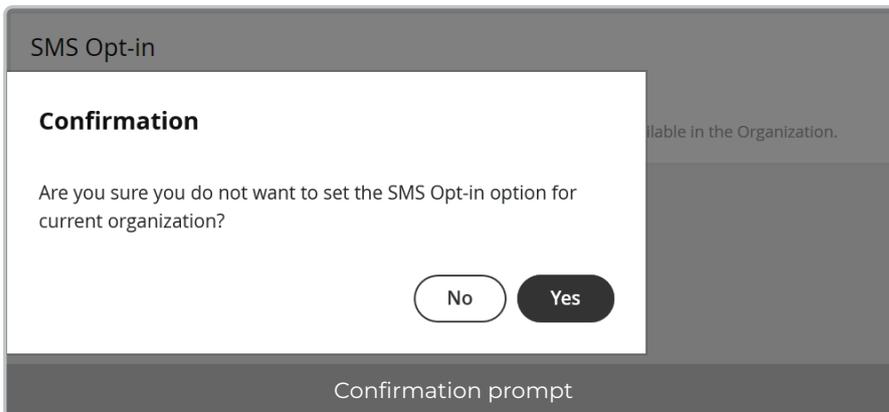
If you don't see the SMS Opt-In option in the menu...

- To get access to the SMS Opt-In feature, please have your admin team reach out to the Movius Support team to make this change on the organization's behalf.
- SMS Opt-In is configured for the Enterprise Customer by the MultiLine service provider. The Enterprise Customer has an "Organization" dedicated to their account. This organization may have smaller sub-organizations representing the Enterprise Customer's regions, business units, departments, etc. The SMS Opt-In service is configured at the main organization of the Enterprise Customer and applies to the entire account.

3. Select or deselect the checkbox to enable or disable SMSOpt-In.

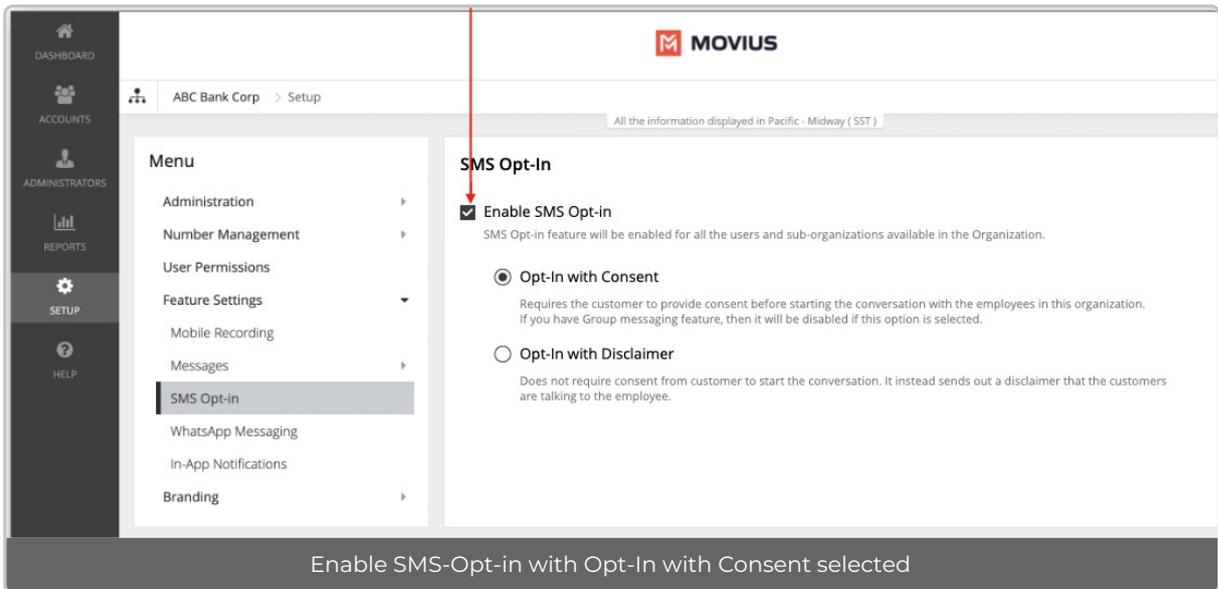


4. Click Yes in the confirmation dialog



Enable SMS Opt-in with Consent

1. Select SMS Opt-in with Consent



Notice

Group Message and SMS Opt-in with Consent cannot be enabled simultaneously.

Group Messages cannot be enabled if the SMS Opt-in with Consent is turned ON for the organization, and vice versa.

SMS Opt-In with Consent Template Message Flow

You can contact your customer service representative to request custom messages to use in the SMS Opt-In feature.

In the scenarios below "XYZ" is a stand in for the name of an Enterprise.

Template Type	Description
SMS Opt-in: SMS Content sent to the customer in case of MT	<p>When a customer initiates the first sms to an XYZ employee, a notification is sent to the customer. The notification is a request to accept or reject the Opt-in process.</p> <p>SMS Opt-in: SMS Content sent to the customer in case of MT</p> <p>Default: [Auto Message] You are trying to reach <Employee Name>. As per company policy, you must provide your consent in order for your message to be delivered. To opt in, reply YES. To opt out, reply STOP.</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>

Template Type	Description
SMS Opt-in: Opt-in requested status notification for MT case	<p>A notification is sent to XYZ employee. This is an information to XYZ employee that a customer is initiating an SMS conversation.</p> <p>Default: [Auto Message] A contact has attempted to send you a message. As per company policy, they have been sent a request to opt in. Once confirmed, you will be able to send/receive messages.</p>
SMS opt-in: OPT-IN accepted status notification for MT case	<p>When the customer accepts the opt-in request, a notification is sent to XYZ employee. This is an information to XYZ employee that they can begin messaging.</p> <p>Default: [Auto Message] Your Contact has opted in. You may continue to send/receive messages.</p>
SMS opt-in: OPT-IN confirmation status notification for MT case	<p>When the customer accepts the opt-in request, a confirmation is sent to the customer. This is an information to customer that they can begin messaging</p> <p>Default: [Auto Message] Opt in confirmed. To opt out at any time, reply STOP. Note: Employee name is a variable, and will be picked by the system.</p>
SMS opt-in: SMS Content sent to the customer in case of MO	<p>When an XYZ employee initiates the first sms to a customer, a notification is sent to the customer. The notification is a request to accept or reject the Opt-in process.</p> <p>Default: [Auto Message] <Employee Name> is trying to reach you. As per company policy, you must provide your consent to continue messaging. To Opt in, reply YES. To opt out, reply STOP.</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>
SMS Opt-in: Opt-in requested status notification for MO case	<p>A notification is sent to XYZ employee. This lets XYZ employee that an opt-in request has been sent to the customer.</p> <p>Default: [Automated Message]: Your contact has been sent a request to Opt-in. Once they accept, you will be able to message with your contact.</p>
SMS opt-in: Opt-in accepted status notification for MO case	<p>When the customer accepts the opt-in request, a notification is sent to XYZ employee. This is an information to XYZ employee that they can begin messaging.</p> <p>Default: [Auto Message]: Your Contact has opted in. You may continue to send/receive messages.</p>

Template Type	Description
SMS opt-in: Opt-in confirmation status notification for MO case	<p>When The customer accepts the opt-in request, a confirmation is sent to the customer. This is an information to the customer that they can begin messaging.</p> <p>Default: [Auto Message]: Opt in confirmed. If you wish to opt out at any time, reply STOP</p> <p>Note: Employee name is a variable, and will be picked by the system.</p>
SMS opt-in: Opt-in rejected status notification for MO case	<p>XYZ employee sends an sms to a customer. When the customer rejects an opt-in request or requests an opt-out, a notification is sent to the employee. This is an information to the employee that they will no longer be able to message with the customer.</p> <p>Default: [Auto Message]:Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.</p>
SMS opt-in: Opt-in rejected status notification to guest for MO case	<p>XYZ employee sends an sms to a customer. When the customer rejects an opt-in request or request an opt-out, a notification is sent to the employee. This is an information to the employee that they will no longer receive messages.</p> <p>Default: [Auto Message]: Opt out confirmed. If you change your mind, please reply with a new message.</p>
SMS opt-in: Opt-in rejected status notification for MT case	<p>A customer sends an sms to an XYZ employee. When the customer rejects the opt-in request or request an opt-out, a notification is sent to the XYZ employee. This is an information to the XYZ employee that they will no longer be able to message with the customer.</p> <p>Default: [Auto Message] Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.</p>
SMS opt-in: Opt-in rejected status notification to guest for MT case	<p>A customer sends an sms to an XYZ employee. When the customer rejects the Opt-in request or request an Opt-out, a notification is sent to the customer. This is an information to the customer that they will no longer receive messages.</p> <p>Default: [Automated Message] Opt out confirmed. If you change your mind, please reply with a new message.</p>
Opt-in text	The text which is send to accept SMS messages. Default: YES
Opt-out text	The text which is send to terminate SMS messages. Default: STOP

Enable SMS Opt-in Disclaimer

You can enable or disable opt-in under Feature Settings in the Setup tab.

1. Select SMS Opt-in Disclaimer

SMS Opt-In

Enable SMS Opt-in
SMS Opt-in feature will be enabled for all the users and sub-organizations available in the Organization.

Opt-In with Consent
Requires the customer to provide consent before starting the conversation with the employees in this organization. If you have Group messaging feature, then it will be disabled if this option is selected.

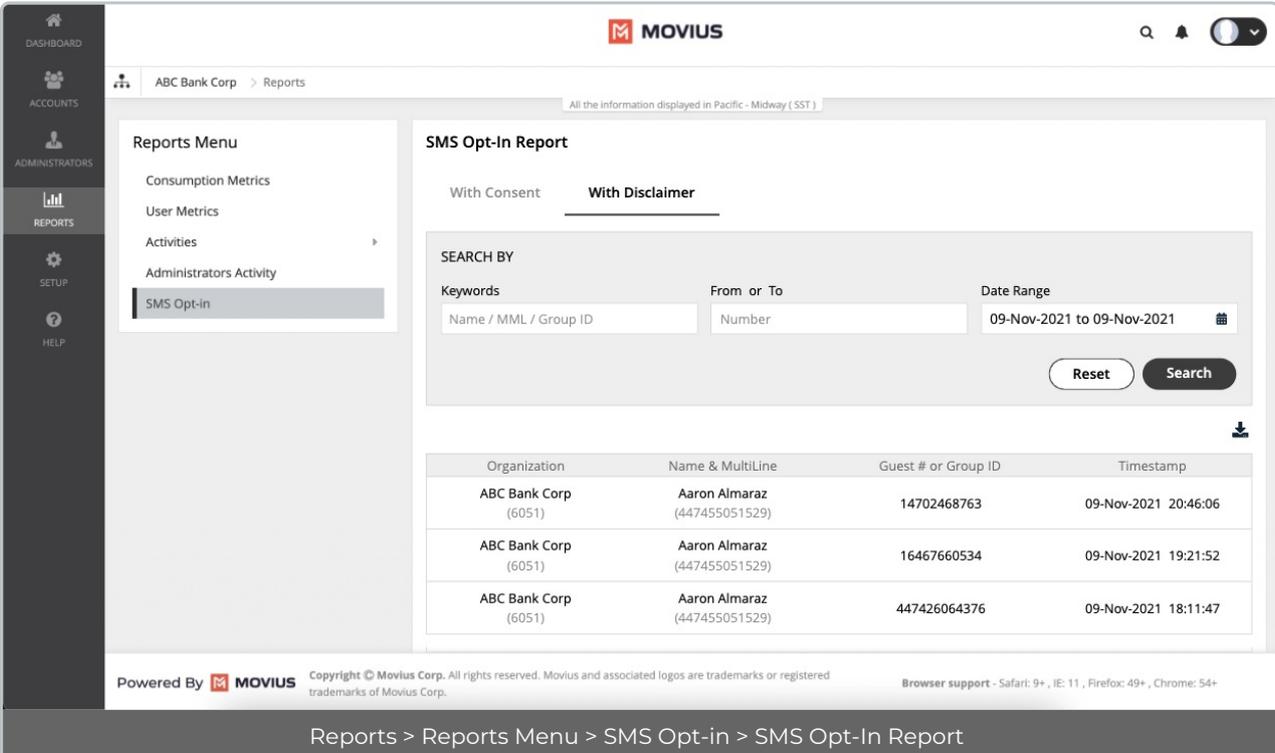
Opt-In with Disclaimer
Does not require consent from customer to start the conversation. It instead sends out a disclaimer that the customers are talking to the employee.

 **Save** **Cancel**

Enable SMS Opt-in with Opt-In with Disclaimer selected

SMS Opt-In Reports

You can view SMS Opt-In Reports in the Reports tool. You can toggle between With Consent and With Disclaimer if using both.



The screenshot shows the MOVIUS Reports tool interface. The left sidebar contains navigation options: DASHBOARD, ACCOUNTS, ADMINISTRATORS, REPORTS, SETUP, and HELP. The main content area is titled "SMS Opt-In Report" and includes a "Reports Menu" on the left with options like Consumption Metrics, User Metrics, Activities, Administrators Activity, and SMS Opt-in. The main report area has tabs for "With Consent" and "With Disclaimer", with "With Disclaimer" selected. Below the tabs is a search section with fields for "Keywords" (Name / MML / Group ID), "From or To" (Number), and "Date Range" (09-Nov-2021 to 09-Nov-2021). A "Search" button and a "Reset" button are present. Below the search section is a table with the following data:

Organization	Name & MultiLine	Guest # or Group ID	Timestamp
ABC Bank Corp (6051)	Aaron Almaraz (447455051529)	14702468763	09-Nov-2021 20:46:06
ABC Bank Corp (6051)	Aaron Almaraz (447455051529)	16467660534	09-Nov-2021 19:21:52
ABC Bank Corp (6051)	Aaron Almaraz (447455051529)	447426064376	09-Nov-2021 18:11:47

At the bottom of the page, there is a footer with "Powered By MOVIUS", copyright information, and browser support details. The breadcrumb trail at the bottom reads: Reports > Reports Menu > SMS Opt-in > SMS Opt-In Report.