

Manage TCPA Opt-In Messages

Last Modified on 11/18/2021 2:39 pm EST

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

Overview

There are regulations in some industries which require that prior to communicating with clients using text messages, the client's consent to receive text messages is requested and captured.

- 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.

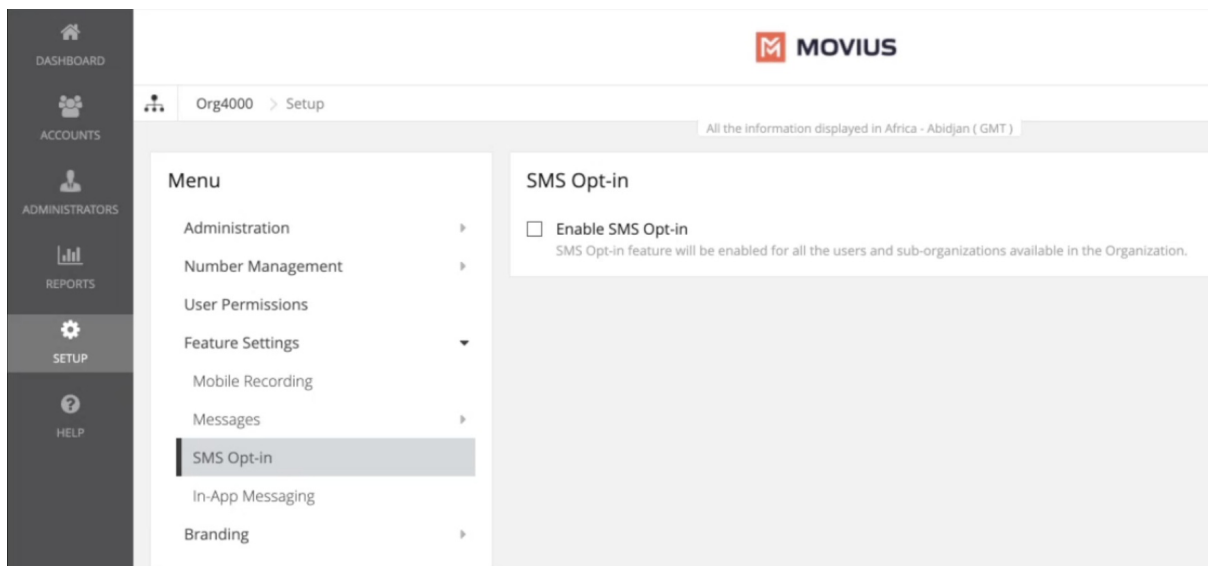
Before you start

- If your organization did not request Opt-In capabilities, you may not see these options in the Management Portal.
- An admin must have "Setup" Role in the organization to do these instructions.
See [What Admin Roles are in the Management Portal](#).

Enable SMS Opt-in

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

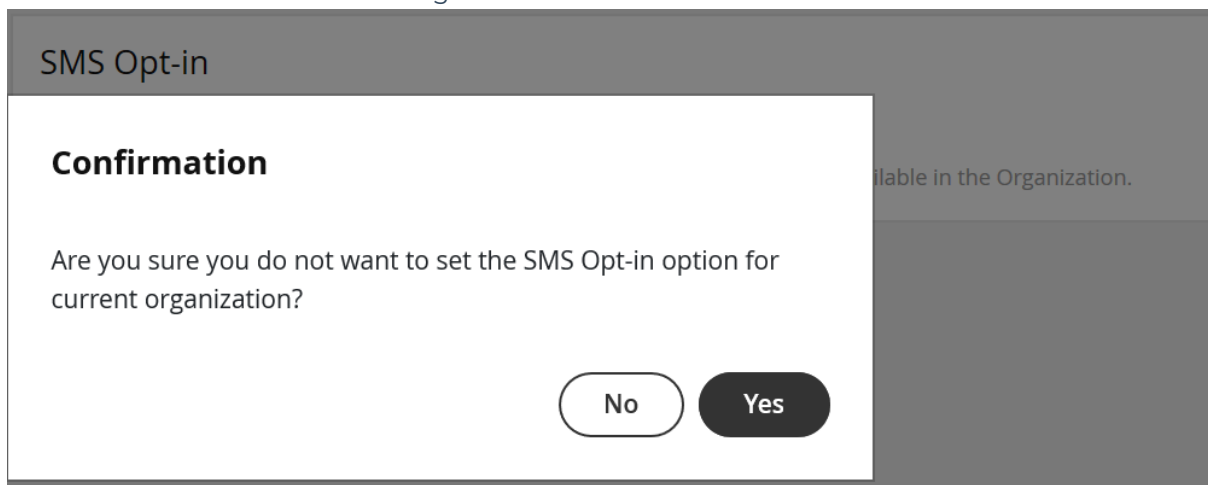
1. Login to MMP
2. Select the relevant Organization/Sub-Organization
3. Go to Setup > Feature Settings > SMS Opt-in



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.

4. Select or deselect the checkbox to enable or disable SMS Opt-In.
5. Click Yes in the confirmation dialog



Notice

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

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

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
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	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.
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SMS Opt-in: SMS Content sent to the customer in case of MT	
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	SMS Opt-in: SMS Content sent to the customer in case of MT
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	Default: [Auto Message] You are trying to reach . 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.
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	Note: Employee name is a variable, and will be picked by the system.
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SMS Opt-in: Opt-in requested status notification for MT case	
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	A notification is sent to XYZ employee. This is an information to XYZ employee that a customer is initiating an SMS conversation.
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	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.
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SMS opt-in: OPT-IN accepted status notification for MT case	
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	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.
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	Default: [Auto Message] Your Contact has opted in. You may continue to send/receive messages.
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SMS opt-in: OPT-IN confirmation status notification for MT case	
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	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
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	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.
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SMS opt-in: SMS Content sent to the customer in case of MO	
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	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.
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	Default: [Auto Message] 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.
--	--

	Note: Employee name is a variable, and will be picked by the system.
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Template Type	Description
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>
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>
	<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</p>

Template Type	Description
Rejected status notification to guest for MT case	Information to the customer that they will no longer receive messages. Default: [Automated Message] Opt out confirmed. If you change your mind, please reply with a new message.

Opt-in text	The text which is send to accept SMS messages. Default: YES
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Opt-out text	The text which is send to terminate SMS messages. Default: STOP
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