Getting consent to message using SMS Opt-In flow

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Read this to learn how the Opt-In Flow collects consent for MultiLine users to send SMS or instant messages to users.

Overview

Many regulated users must get consent from the other party to start text messaging conversations. MultiLine automates this process for you, ensuring that any time you are messaging with a number for the first time that your organization will collect their consent to be sent messages. These messages are captured by the platform for attestation purposes.

Before you start

- Your organization determines whether you have SMS Opt-In turned on.
- Using WhatsApp Messaging Connector requires Opt-In.

SMS Opt-In Flow

- Default messages are provided in the scenarios below. Your organization may configure the messages differently.
- You or the client can initiate the opt-in flow.

MultiLine User initiates the Opt-In Flow

When you try to message a client at a number that you haven't messaged with previously, the customer will receive a notification message requesting they accept or reject the Opt-in process.

- **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:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also see a message letting you know the customer has been requested to accept the Opt-in.

- **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.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with each other.

- **Default:** [Auto Message]: Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **Default:** [Auto Message]: Opt in confirmed. If you wish to opt out at any time, reply STOP

Opt-Out Flow

The client can choose to reject messaging at any time by replying to the message conversation with STOP.

If the client opts out, you'll see a notification letting you know you can no longer message with the client.

- **Default:** [Auto Message]:Your contact has opted out. No further messages can be sent to this contact until they have provided their consent again.

The client will also see a message letting them know they have successfully opted out and how to undo their decision, if desired.

- **Default:** [Auto Message]: Opt out confirmed. If you change your mind, please reply with a new message.

Client initiates the Opt-In Flow

When a client tries to message you first, and you haven't messaged together previously at that number to establish opt-in, the client will automatically see a notification message. The notification is a request to accept or reject the Opt-in process.

- **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.
- **Note:** will show your name as it was submitted by the MultiLine Admin in the MultiLine Management Portal.

You will also receive a notification letting you know that the client has tried to contact you.

- **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.

When the customer accepts the opt-in request by replying to the message with YES, you'll receive a notification letting you know you can begin messaging with the customer.

- **Default:** [Auto Message] Your Contact has opted in. You may continue to send/receive messages.

The customer will also receive a notification letting them know you can begin messaging with each other.

- **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.