

# Messaging Opt-In Flow Product Document

Last Modified on 08/04/2022 11:51 am EDT

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 their clients 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.

## 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] <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.
- **Note:** <Employee Name> 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 <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.
- **Note:** <Employee Name> 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.

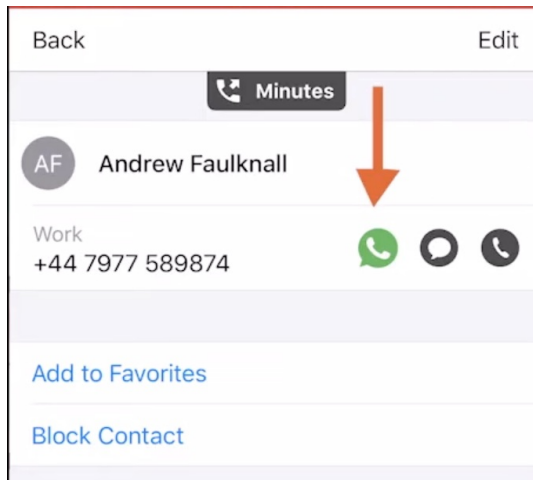
## WhatsApp Opt-In Flow

Refer to this topic to learn what to expect when you initiate a new WhatsApp conversation.

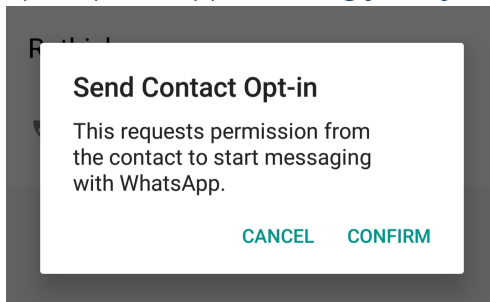
You can only send WhatsApp messages to users in your contacts. If you need help setting up your contacts, see [Add Contacts](https://moviuscorp.helpjuice.com/_questions/536520) ([https://moviuscorp.helpjuice.com/\\_questions/536520](https://moviuscorp.helpjuice.com/_questions/536520)).

When you try to send a message to a client with WhatsApp for the first time, you're required to get consent using an Opt In process.

1. To start a new WhatsApp conversation, find your contact and click the WhatsApp icon.



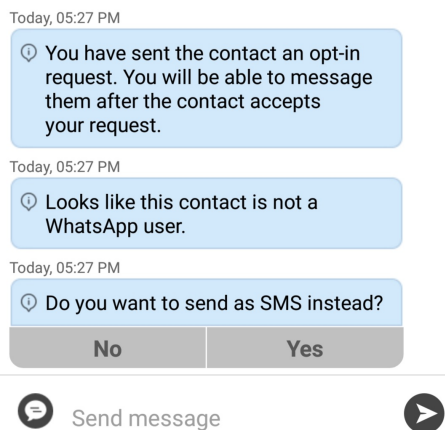
1. A prompt will appear asking you if you'd like to send the contact an Opt In message.



2. Click **Confirm** to send the Opt-In. There are four possible outcomes:

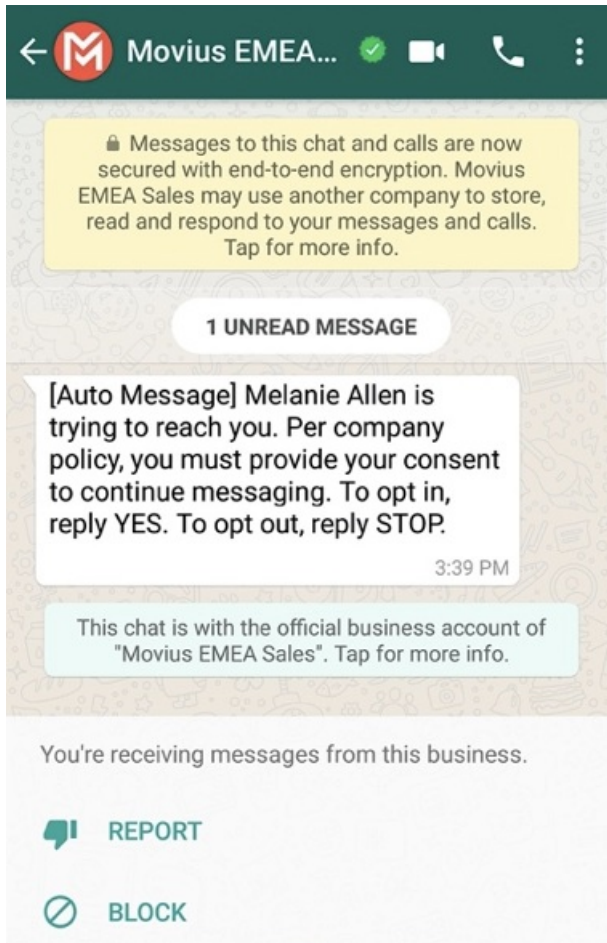
1. *Contact doesn't have WhatsApp*

1. You'll see a message letting you know your contact isn't a WhatsApp user, and ask if you'd like to send an SMS instead.



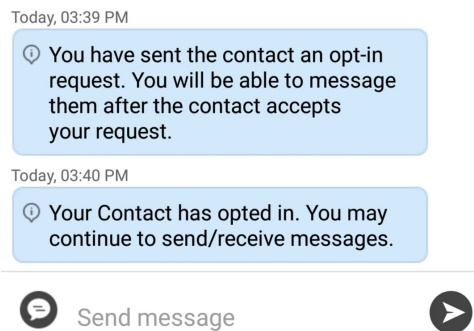
2. Select **Yes** to go to the SMS message screen. Select **No** to return to contacts.

2. *Contact has WhatsApp- customer receives opt-in request*

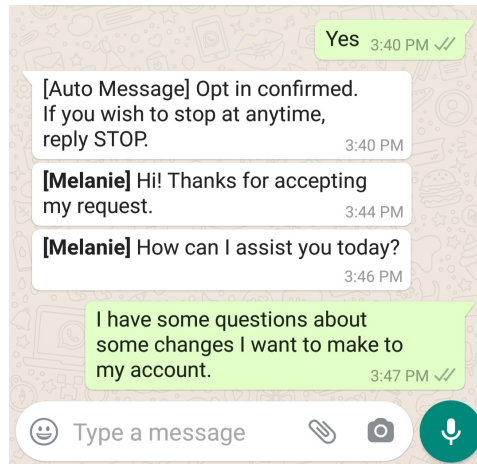


## 1. Contact accepts Opt-In request

1. You'll see a confirmation message letting you know the contact has chosen to opt-in.

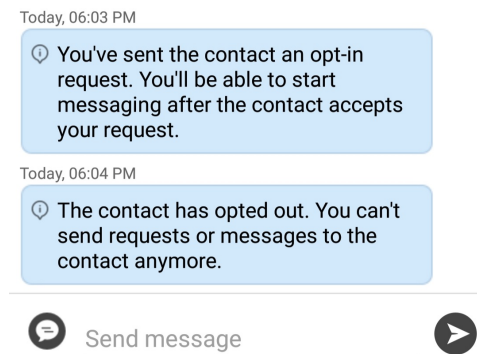


2. Your contact will see a message letting them know they've opted-in.



## 2. Contact rejects Opt-In request

1. If your contact rejects the Opt-In, you'll see a message letting you know. The message templates and send message field will be disabled for the contact.



2. The customer will be informed of their Opt-Out status, and that it is possible to Opt-In at any time by replying "yes".



## 3. Contact doesn't respond to Opt-In request

1. If your contact doesn't respond to the Opt-In, you'll be able to send a new one

