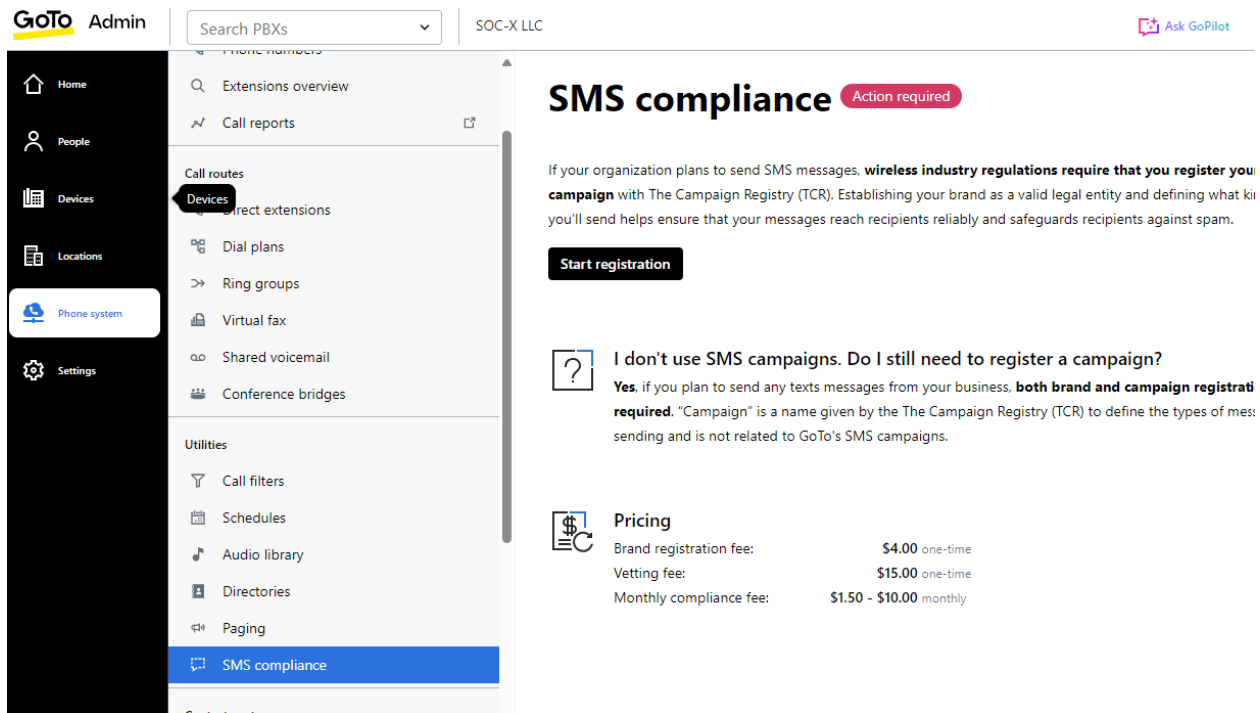


SMS REGISTRATION

****IMPORTANT NOTE**:** To send SMS messages to third parties, the users will need to have access to the desktop or mobile application. This will require the users to have a valid email address on their users and their own password.

1. Go to <https://admin.goto.com/>. You need to be an Admin or a Super Admin to submit your SMS registration.
2. Go to the list of tabs on the left side and click on “Phone system”.
3. Go down to the “Utilities” section and click on “SMS Compliance”.
4. Carefully read the information provided on the tab:



The screenshot shows the GoTo Admin interface. On the left, a sidebar menu has 'Phone system' selected. Under 'Phone system', the 'Utilities' section is expanded, and 'SMS compliance' is highlighted. The main content area is titled 'SMS compliance' with a red 'Action required' badge. It contains a paragraph explaining the need for registration, a 'Start registration' button, a FAQ section with a question 'I don't use SMS campaigns. Do I still need to register a campaign?' and a pricing table.

SMS compliance Action required

If your organization plans to send SMS messages, **wireless industry regulations require that you register your campaign** with The Campaign Registry (TCR). Establishing your brand as a valid legal entity and defining what you'll send helps ensure that your messages reach recipients reliably and safeguards recipients against spam.

[Start registration](#)

I don't use SMS campaigns. Do I still need to register a campaign?
Yes. if you plan to send any texts messages from your business, **both brand and campaign registration** is required. “Campaign” is a name given by the The Campaign Registry (TCR) to define the types of messages you'll send and is not related to GoTo's SMS campaigns.

Pricing

Brand registration fee:	\$4.00 one-time
Vetting fee:	\$15.00 one-time
Monthly compliance fee:	\$1.50 - \$10.00 monthly

This section includes information about why the registration is needed and important information about pricing:

- **Brand registration fee: \$4.00 (one time)**
- **Vetting fee: \$15.00 (one time)**
- **Monthly fee (depending on the volume of your campaign (\$1.50-\$10.00))**



If your registration is rejected, the carrier will charge a fee of \$15.00 each time you attempt the registration, so please make sure to fill out this registration as accurately as possible.

5. When you are ready to start your registration, click on “Start Registration”.
6. A window will pop up with important information about your website. Your website must comply with these requirements before you start your SMS registration.
To assist you in drafting a comprehensive privacy policy, we recommend referencing the SMS privacy policy template provided by HatchApp (**Not affiliated to GoTo nor legal advice**):
<https://www.usehatchapp.com/blog/sms-privacy-policy-template>

Below is another example of a compliant Privacy Policy:

[Terms of Use](#) [Privacy Policy](#) [Accessibility Statement](#) [SMS Privacy Policy](#)

Terms and Conditions / SMS Privacy Policy

C3 Equine Veterinary Services respects your privacy. By opting into our SMS messaging service, you agree to the following terms regarding how we handle your data:

1. Data Collection: We will collect your name, email address, mailing address, and mobile phone number when you sign up for SMS updates. The information will be collected via the website contact form, email, rental agreement, or third-party reservation systems.
2. Data Usage: We use your data solely for sending updates, and reminders related to our products or services.
3. Data Security: We protect your data with secure storage measures to prevent unauthorized access.
4. Data Retention: We retain your information as long as you are subscribed to our SMS service. You may request deletion at any time.
5. MESSAGE AND DATA RATES MAY APPLY. Your mobile carrier may charge fees for sending or receiving text messages, especially if you do not have an unlimited texting or data plan.
6. Messages are recurring, and message frequency varies.
7. Contact C3 Equine Veterinary Services at 508-859-0035 or info@c3equine.com for HELP or to STOP receiving messages.
8. Opt-Out: You can opt out of the SMS list at any time by texting, emailing, or replying STOP to info@c3equine.com or 508-859-0035. We will remove your number from our list within 24 hours.
9. Non-Sharing Clause: We do not share your data with third parties for marketing purposes. C3 equine Veterinary Services will not sell, rent, or share the collected mobile numbers.

We also suggest adding a statement like the following, as most campaigns get approval with this statement: ***“Notwithstanding anything to the contrary in this privacy policy, your consent to receive SMS messages applies solely to us. It does not apply to the activities of any third party. We will not share your mobile number with any third party for their marketing or promotional purposes.”***

Your website must also include a statement like the following in your Terms and Conditions:

By providing us with your phone number, you agree to receive text messages and notifications from [Company Name] regarding [Include the type of messages that will be sent.] Message frequency varies based on communication needs. Message and data rates may apply. No mobile information will be shared with third parties. Reply STOP to unsubscribe to a message sent from us. For assistance, you can reply HELP. We will not share your mobile opt-in data with third parties. You can access our privacy policy and terms and conditions at [include link to your website.]



The Privacy Policy and Terms and Conditions can be displayed on the same page, but each must be correctly identified.

If you don't have a website for your organization, you must have an online presence (social media like Facebook, Instagram, etc.). There, you can have a PDF copy of your Terms and Conditions and Privacy Policy, or state that your customers can submit a copy of them at their request.

If you don't have a social media presence, you can create a PDF with your Terms and Conditions and Privacy Policy, upload it to a drive, and share the link to the drive on the registration.

Before you start your registration



The Campaign Registry will review your website for certain criteria. If your website is not compliant, your registrations may be rejected, leading to additional fees. Before you start check that your website:

1. Is fully functional and appropriately age-gated if needed.
2. Contains opt-in messaging that tells subscribers how their number will be used.
3. Contains a compliant and easily-accessible privacy policy.

Pro tip: Make sure that all data collection forms on your website contain a link to your privacy policy.

[Learn more](#)

Start registration

7. If your website complies with these requirements, click *"Start registration"*.
8. The page will direct you to the first page of the registration. Fill the page with information from your company. You will need to have at hand:
 - a. Your Legal Company Name
 - b. Your EIN/Tax number issuing country
 - c. Your EIN/Tax number (9-digit tax number issues to your business)
 - d. The legal form of your organization (Private profit/Non-profit)



Register your brand with The Campaign Registry



To avoid extra resubmission costs, double-check that all your info is correct before submitting. Even small mistakes, like typos, can cause your registration to be denied.

To send business SMS messages from your GoTo account, wireless industry regulations require that you register your brand and at least 1 SMS campaign with The Campaign Registry.

Brand details

Legal company name

Company name exactly as it appears in legal registries.

Brand name (optional)

Name your company is commonly known by if different from legal name.

EIN/Tax number issuing country

EIN/Tax number ⓘ

9-digit tax number issued to your business.

9. Once you have completed this information, click on “*Next: Review brand registration*”.
10. Use case: you must select the type according to the kind of content you plan to send recipients.
 - a. Low volume mixed: this case *allows* you to send up to 2,000 messages daily to your customers, and different types of messages (marketing and conversational). This campaign has a cost of **\$1.50 per month to allow 2,000 messages to be sent per day**.
 - b. Low volume conversational: this case *allows* you to send up to 2,000 messages daily in standard conversational style. This campaign has a cost of **\$1.50 per month to allow 2,000 messages to be sent per day**.
 - c. High volume conversational: this case *allows* you to send more than 2,000 messages per day in a standard conversational style. This campaign has a cost of **\$10.00 per month to allow more than 2,000 messages to be sent per day**.
 - d. Marketing: this case *allows* you to send more than 2,000 messages per day regarding any type of marketing or promotional messages. This campaign has a cost of **\$10.00 per month to allow more than 2,000 messages to be sent per day**.

For information on how SMS credits work and how you will be billed, you can check the “*SMS Credits and Billing*” section at the end of this guide.

Add details about your campaign and the kind of content you plan to send recipients.

Use case

☐ Low volume mixed Suited for businesses sending different types of messages.	\$1.50/month
☒ Low volume conversational Suited for businesses sending fewer than 2,000 messages daily in a standard conversational style. Recommended for most customers	\$1.50/month
☐ High volume conversational Suited for businesses sending more than 2,000 messages daily in a standard conversational style.	\$10.00/month
☐ Marketing Suited for businesses sending any type of marketing or promotional messages.	\$10.00/month

11. Campaign description: please describe in detail why you will be sending SMS messages. Even if you are not sending SMS campaigns, you need to describe why your business will be sending SMS to third parties.

- a. *Example: "[Company/Brand Name] offers a variety of services related to [brief description of services you offer] and we use SMS messaging regarding appointment reminders, updates, promotional, marketing, and responses to your inquiries [Update this to the type of messages that will be sent]. Messages are sent only to existing customers who have opted in. All messages are operational and do not include marketing or promotional content. Message frequency varies based on customer needs."*

**** IMPORTANT NOTE** You can use the AI Tool to generate a description, as long as it is accurate for your business and that it includes all the information of the message above.**

Campaign description

Describe why you'll be sending SMS messages.

Note: You must enter a valid reason for sending SMS messages to recipients. This is required even if you do not plan to use GoTo SMS campaigns. Entering a placeholder or invalid description will cause your registration to fail.

505/4096

12. Terms and Conditions and Privacy Policy Link: Add the links to your website's Privacy Policy and Terms and Conditions. The Privacy Policy and Terms and Conditions can be

included on the same page as long as they are clearly separated into distinct sections. Each section should be properly labeled to ensure clarity for users.

13. Opt-in methods: recipients of your SMS messages need to consent to receive messages from you. Some common options are:

- a. **Online forms:** customers opt- in via the website where they provide their phone number. You must provide a step-by step guide on how the customers can provide their phone number. The phone field should not be mandatory. You must provide a clear disclosure message with a functioning hyper link to your Privacy Policy and Terms and Conditions.

If the opt-in script is not displayed on the initial page or is only displayed after a few steps are completed, please provide a screenshot showing where and how the web opt-in is collected.

- i. Example of online forms: *“Customers can opt-in by filling out the contact us section in our website and provide their phone number on our website [insert direct link to the contact form.] When they provide their phone number they agree to the following statement: ‘By checking this box, you agree to receive text messages regarding appointment reminders, updates, and responses to your inquiries [needs to match your campaign description type of messages] from [Company Name]. Message frequency varies depending on the scenario. Msg & data rates may apply. No mobile information will be shared with third parties. Reply HELP for help. Reply STOP to cancel. View our Privacy Policy and Terms and Conditions here: [Privacy Policy and T&C hyperlink].’*
- b. **Written Opt-in:** SMS recipients sign a physical or a digital form agreeing to receive SMS. You need to provide a copy of the form that will be used to collect the consent of your recipients. The form must include a clear consent statement similar to verbal or web opt-ins. The forms must also be attached on your registration.
 - i. Example of written opt-in: *“As part of the onboarding process, employees provide their mobile number and sign a written agreement that includes the following consent statement: ‘By providing your mobile number, you agree to receive SMS updates regarding appointment reminders, updates, and responses to your inquiries [needs to match your campaign description type of messages] from [Company Name]. Message frequency may vary. Message & data rates may apply. Your mobile information will not be shared with third parties. You can reply STOP to unsubscribe or HELP for assistance. You can visit our website to check our Privacy Policy and Terms & Conditions.’”*

- c. **Verbal opt-in over the phone/in person:** SMS recipients verbally agree to receive SM during a phone call, onboarding process or in person.

- i. Example of verbal opt-in: *"Customers can call our phone number [Phone Number], which they can get from referrals or our social media/website [insert the link]. They provide their consent to receive text messages from us by agreeing to the following script: 'By providing your mobile number, you agree to receive text messages from [Company Name] regarding appointment reminders, updates, and responses to your inquiries [needs to match your campaign description type of messages]. Message frequency varies based on communication needs. Message & data rates may apply. No mobile information will be shared with third parties. You can reply STOP to unsubscribe at any time or HELP for assistance. You can visit our website to check our Privacy Policy and Terms & Conditions.'"*

**** IMPORTANT NOTE**:** Verbal opt-ins cannot be used for mixed or marketing campaigns.

- d. **Implied Opt-In (Keyword):** SMS recipients initiate SMS communication by texting a keyword (for example, "START") to your business. You must explain how your customers get your phone number, advertise how SMS recipients can text the keyword/initiate the text message conversation (like a link to the webpage where the keyword opt-in is advertised or an attached screenshot of the keyword opt-in advertisement) and you must include the opt-in message that will follow.

- i. Example of Implied Opt-in: *"Customers get our phone number from referrals or our social media/website [insert the link]. They can text START or JOIN to [Phone Number] to receive SMS updates from [Company Name] and they will receive the following message: 'Thank you for opting in to receive recurring messages from [Company Name] regarding appointment reminders, updates, and responses to your inquiries [needs to match your campaign description type of messages]. Msg frequency varies. Msg & data rates may apply. No mobile information will be shared with third parties. Reply HELP for help. Reply STOP to cancel. You can check our Privacy Policy and Terms and Conditions at this link [insert link]'"*

- e. **Consumer-initiated opt-in:** SMS recipients initiate SMS communication by texting your business. You must explain how your customers get your phone number, advertise how SMS recipients can start a conversation.

- i. Example of Consumer initiated opt-in: *"By starting a text conversation with [Company Name] by texting [phone number] you are agreeing to receive conversational messages from [Company Name]. Msg & data rates may apply. Msg frequency varies. Unsubscribe at any time by replying STOP or*



clicking the unsubscribe link (where available). Reply HELP for help. Privacy Policy [link] & Terms [link]."

****IMPORTANT NOTE**:** This disclaimer must be included in both the Privacy Policy and the place where the number for texting is advertised.

 Opt-in methods (CTA)

Describe exactly how a user signs up to receive messages. All traffic on behalf of your business, entity, or organization must have prior opt-in/consent. Opt-in must be on an individual level, cannot be shared with third parties and cannot be implied. Acceptable opt-ins may include, but are not limited to, online forms, paper forms, verbal opt-ins over the phone, or text messages.

Important! This section should be as detailed and complete as possible, highlight every step, and provide extra clarity wherever you can.

- If opt-ins are collected on a website, the specific website URL must be provided in the description.
- Include Brand name.
- Provide the Privacy Policy and Terms and Conditions in the description or in the links section above.
- Text message

The vetting aggregator will review the actual **Opt-in disclosure shared with the user during the opt-in collection**. This disclosure must contain the following information:

- Brand name
- Types of messages being sent
- Message frequency disclosure (Msg frequency varies, 2/msgs per week, etc.)
- "Message and data rates may apply" disclosure
- HELP information (text HELP for help)
- STOP/opt-out information (text STOP to stop)
- Link to the Privacy Policy and Terms & Conditions

[Learn more](#)

14. **Sample messages:** the sample messages should accurately reflect the messages you will send. If the messages that you send differ from the sample types you provide, the messages will likely be blocked by the carrier.

Every sample message must include the name of your business, include opt-out language (STOP to unsubscribe), and ensure that messages align with operational, informational or transactional use, and avoid marketing/promotional language unless the marketing case was selected.

Examples of Compliant Sample Messages:

- a) Appointment Reminder: *"Hi [Customer Name], this is [Company Name]. Your appointment is confirmed for [Date/Time]. Reply STOP to unsubscribe."*
- b) Service Update: *"Hello, this is [Company Name]. Your service request has been completed. Please contact us if you have any questions. Reply STOP to unsubscribe."*

- c) Follow-Up Message: *"Hi [Customer Name], this is [Company Name]. We wanted to follow up regarding your recent inquiry. Please let us know if you have additional questions. Reply STOP to unsubscribe."*
- d) Operational Alert: *"Attention: This is [Company Name]. Due to [reason], our office will be closed on [Date]. Reply STOP to unsubscribe."*

Sample messages (Add up to 5)

These sample messages should accurately reflect the types of messages you will send. Messages that differ from pre-approved sample types are more likely to be blocked by wireless providers.

Message 1

223/1024

15. Once this page is completed, click on *"Next: Campaign options and content."*
16. **Subscriber messages and keywords:** add the messages that you will send third parties to opt in or out of the campaign. You can add more than one keyword.

These messages are now automatically generated by our AI tool. Please just make sure the information is accurate and that your STOP and HELP keywords match your Privacy Policy.

Subscriber messages and keywords

Add standard messages for subscribers and keywords they can use to opt in or out of the campaign or request help. Separate keywords using a space, comma, or return.

Opt-in

Keywords

Add new keywords

JOIN X
SUBSCRIBE X

Opt-in message

121/320

Opt-out

Keywords

Add new keywords

STOP X
UNSUBSCRIBE X

Opt-out message

00/320

17. **Content details:** from the options provided, select all the ones that apply to the contents of your messages. **If your sample messages reflect a type of content that was not selected, your campaign might be rejected, so please make sure to check all that apply.**

Content details

Select all the options that apply to your campaign content.

- ☒ Embedded phone number
Messages may contain a linked phone number.
- ☐ Age-gated content
Content restricted for recipients under 18.
- ☐ Embedded link
Messages may contain a URL. URL shorteners, such as bitly and tinyurl are not supported.
- ☒ Number pooling
Campaign will use 50+ numbers for sending SMS messages.
- ☐ Direct lending or loan arrangement
Messages may contain content around money lending.

****IMPORTANT NOTE** Your sample messages must reflect whatever options are selected here. E.g., If “Embedded link” is selected, one of your sample messages must include a link.**

18. Once this page is completed, click on “*Validate Campaign*”. This will allow our AI tool to check the campaign and let us know what the level of confidence is. If the level is low, check the recommendations made by the AI and modify your campaign.
19. Check the summary for your campaign to make sure that all the information provided is correct.

20. If all the information of your campaign is correct, click on the confirmation box at the bottom of the page and click on “*Submit*”. This will move your request to the pre-vetting stage, where our AI tool reviews the information and assesses if any changes need to be made before it is submitted to the vetting team. **The pre-vetting can take up to 7 business days.**
21. Once the pre-vetting has been passed, it can take from **5-15 business** days to receive an approval or a rejection.
- If your campaign is rejected, you will receive an email asking you to modify your campaign. The portal will show yellow messages in the sections where modifications need to be made.
 - If your campaign is approved, your registration on the “SMS Compliance” section of your PBX will look as below:

SMS compliance

✔ Your brand is registered. [Edit brand registration](#) 🗑️

Description	Assigned phone numbers ❓	Status
My primarily uses SMS messages for sending out e...		Active

22. All numbers with SMS permissions will be automatically added to your campaign once this has been approved. If wish to enable SMS permissions to more numbers so they can be added to the campaign, you can follow the steps here: <https://support.goto.com/connect/help/how-do-i-change-the-settings-on-a-phone-number>

Number Pooling

If you require to enable SMS permissions for more than 49 numbers, please follow these steps:

1. In the admin portal, go to the “Phone System” tab
2. Go to “SMS Compliance” under the “Utilities” menu.
3. Click on “Configure phone numbers” on the description of the active campaign”:

SMS compliance

 Your brand is registered. Edit brand registration 			
Use case	Description	Assigned phone numbers 	Status
Low volume mixed	offers a variety of services related to s...	Configure phone numbers	Active

4. On the top right corner of the screen, click on “Request a Number Pool”:

[SMS compliance](#) / [Low volume mixed](#)

[Configure phone numbers](#)
[Settings](#)

1/49 phone numbers linked

To link more [request a number pool](#)

Search...

Phone number	Linked to campaign
+1 636 206 4359	☒

This will open a pop-up window with the form that needs to be completed:

- Detailed description as to why this brand needs more than 49 TNs for this specific campaign: Include the description of your campaign from your registration, and the reason why more than 49 numbers are needed. You must also have more than 49 users in your PBX.
- How many phone numbers do you plan to utilize for SMS on your PBX.
- Provide the maximum daily volume of messaging traffic.
- Percentage of SMS traffic sent daily.
- Percentage of MMS traffic sent daily.

To request number pooling, **you must have only 48 numbers enabled to send SMS**. Otherwise, your number pooling request might be rejected.

****IMPORTANT NOTE**:** Number pooling requires you to have a compliant Privacy Policy. The vetting team will review your website again, and if something is not compliant, changes will have to be made in order to obtain approval.

The vetting period for number pooling can take up to 10 business days.



SMS Credits and Billing

SMS Credits

SMS credits refer to an allowance provided to the account to send and receive SMS and MMS messages. A single credit accounts for, on average, 160 characters (not including emojis, links or pictures).

SMS credits reset every month. Each user has a total of credits depending on their licensing type, as per the information below:

- GoTo Connect Standard – 80 SMS credits
- GoTo Connect CX – 1000 SMS credits

All the user credits are added to your account in a credit pool. If you exceed the amount of credits you had for your PBX, you will be charged a fee that will be reflected in your bill. For both GoTo Connect Standard Licenses and GoTo Connect CX licenses, the price for each extra credit is \$0.0055

Download your Billed SMS Details

To download your billed SMS details and see how many credits you are using each month, follow the instructions provided in [this](#) article.