

BUSINESS SMS APPROVAL

10DLC Brand and Campaign Registration Questionnaire

Please complete this questionnaire so we can prepare your 10DLC Brand and Campaign registration. The information you provide should accurately describe your business, how customers consent to receive text messages, and the types of messages you intend to send. Incomplete or inconsistent information can delay approval.

1. Customer and contact information

Company or organization legal name _____

DBA or trade name (if different) _____

Primary contact name _____

Title _____ Email address _____

Phone number _____ Company website _____

Business address _____

City, state and ZIP _____

2. Brand information

The Brand is the legal business entity responsible for the messaging program. Enter the legal business name exactly as it should appear in the registration.

Legal business name _____ Federal EIN or Tax ID _____

Entity type ☐ Private, for profit ☐ Public, for profit ☐ Non profit

If publicly traded, stock symbol _____ Industry or business type _____

Briefly describe what your company does (1 to 3 sentences):

3. Who will receive your text messages?

- ☐ Existing customers
- ☐ Prospective customers and leads
- ☐ Both existing and prospective customers
- ☐ Employees and internal users
- ☐ Other (describe):

How do you obtain the recipient's mobile phone number? _____

4. What types of text messages will you send?

Check ALL that apply, and give examples in the space provided.

- ☐ Customer service and support
- ☐ Account or policy notifications
- ☐ Appointment reminders and confirmations
- ☐ Quotes and quote follow up
- ☐ Claims related communications
- ☐ Billing and payment reminders
- ☐ Renewals
- ☐ Order and transaction notifications
- ☐ Marketing and promotional offers
- ☐ Lead follow up
- ☐ Two way customer conversations
- ☐ Other:

Describe the messages you intend to send:

How frequently will messages typically be sent? _____

5. Campaign and use case

Select the description that best matches the campaign. If you are unsure, describe the campaign and we will determine the most appropriate registration category.

- ☐ Customer Care
- ☐ Account Notifications
- ☐ Marketing and Promotional

- ☐ Mixed use, explain below
- ☐ Other or specialized use case

Campaign purpose. What is the primary reason for sending text messages?

Will ANY messages contain advertising, promotions, discounts, sales offers or solicitations?

☐ Yes ☐ No

If yes, describe the promotional content and how customers opt in to receive it:

6. Consumer opt in and call to action

THIS SECTION IS CRITICAL. TCR AND THE CARRIERS MAY REQUIRE EVIDENCE SHOWING EXACTLY HOW A CONSUMER AGREED TO RECEIVE MESSAGES.

Where does the customer opt in?

- ☐ Company website
- ☐ Online quote or lead form
- ☐ Paper form
- ☐ In person or agent assisted
- ☐ Phone conversation
- ☐ Text to join keyword
- ☐ QR code
- ☐ Other:

Provide the URL of the page or form where SMS consent is collected (if applicable):

Describe the exact steps a customer takes to opt in:

Copy the EXACT SMS consent language shown to the customer:

Please confirm each of the following.

- ☐ The SMS consent checkbox is optional and is NOT required to purchase goods or services.
- ☐ The SMS consent checkbox is unchecked by default.
- ☐ The opt in language identifies the company or program sending the messages.
- ☐ The opt in language states that message frequency varies.
- ☐ The opt in language states that message and data rates may apply.
- ☐ The opt in language provides STOP and HELP instructions.
- ☐ The opt in process links to the Privacy Policy and/or Terms.

7. Website, privacy policy and terms

Privacy Policy URL

Terms and Conditions URL

SMS Terms URL (if separate)

Customer support HELP phone number

 Customer support email

Please confirm each of the following.

- ☐ Our Privacy Policy addresses SMS and text messaging.
- ☐ Our Privacy Policy does NOT state that mobile opt in data is sold or shared for third party marketing.
- ☐ Our website's SMS consent language matches the campaign being registered.
- ☐ We can provide a screenshot or other evidence of the opt in process if requested.

8. Sample messages

Provide two to four realistic examples of messages you expect to send. Include the company or brand name in each sample where practical. Do not provide generic examples that do not reflect actual traffic.

Sample message 1:

Sample message 2:

Sample message 3:

Sample message 4:

9. Opt out and HELP handling

What happens when a customer replies STOP?

☐ The number is automatically suppressed from future messages.

☐ A staff member manually removes the number.

☐ Other:

What response is sent to HELP requests?

Additional opt out keywords you support (STOP, UNSUBSCRIBE, CANCEL, END, QUIT)

Customer service phone number for messaging assistance

10. Message sender and phone numbers

CloudX domain or customer name (if known)

Sending phone numbers, if already assigned

Are these numbers already being used for SMS? ☐ Yes ☐ No ☐ Not yet assigned

If currently used, what type of messages are being sent from these numbers?

11. Consent records and compliance

Please confirm that your organization can document consumer consent when requested.

☐ We retain the phone number that opted in.

☐ We retain the date and time of consent.

☐ We retain the source or method of consent (website, form, agent, etc).

☐ We can identify the campaign or program for which consent was given.

☐ We retain the consent language or can reproduce what the consumer saw.

☐ We maintain opt out and suppression records.

Where are consent records stored? _____

How long are they retained? _____

12. Special circumstances

☐ We use lead vendors or lead generation companies.

☐ We purchase or receive leads from third parties.

☐ We send messages on behalf of another company or brand.

☐ We use multiple brands or DBAs.

☐ We use an agency or marketing company to send messages.

☐ We send messages involving financial services, healthcare, debt collection, political content, gambling, or other regulated or sensitive topics.

☐ None of the above

If any box above is checked, explain:

13. Customer certification

By signing below, the customer confirms that the information provided is accurate and that the intended messaging program will follow applicable SMS consent, opt out, privacy and messaging requirements. Submission of this questionnaire does not guarantee campaign approval. TCR, the carriers and messaging providers may request additional information or changes.

Authorized representative name _____

Title _____

Signature _____

Date _____

Return the completed questionnaire to service@xclutel.com.

14. Internal use: CloudX and 10DLC submission

Brand status _____

Brand ID _____

Campaign ID _____

Campaign use case _____

Campaign description _____

Opt in and CTA reviewed by _____

Privacy policy reviewed _____

Terms reviewed _____

Sample messages reviewed _____

Submission date _____

Approval or rejection date _____

Notes:
