

Business Text Messaging (10DLC) Registration Form

Complete and return to Heritage Telecom. We submit this to The Campaign Registry (TCR) on your behalf. Carriers review every registration, and details that don't match public records are the most common reason for rejection.

1. Business (Brand) Information

Legal Company Name *		DBA / Brand Name	
EIN / Tax ID *		Tax ID Issuing Country	United States
Country of Registration *	United States	DUNS / GIIN / LEI (optional)	
Street Address *		City *	
State *		Zip Code *	
Website *		Vertical *	Professional Services
Support Email *		Support Phone *	
Stock Symbol / Exchange		Business Contact Email	

Legal Form * ☐ Private for-profit ☐ Public for-profit ☐ Non-profit ☐ Government ☐ Sole proprietor

Legal name and EIN must match IRS records exactly (as shown on your CP 575 or 147C letter), including punctuation such as "Inc." or "LLC". The address must be the one the IRS has on file. **Business Contact Email:** a real person at your company who can complete Brand Attestation, on your own domain (not Gmail/Yahoo/etc. and not a shared inbox). They will get a PIN email from noreply@auth.campaignregistry.com and must finish within 7 days; ask them to check spam. Stock symbol applies to publicly traded companies only.

2. Campaign Information

Use case: Low Volume Mixed (Heritage default, for lower-volume business texting). Choose 1 to 5 sub-use cases below; most funeral homes need only Customer Care and Account Notification.

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|--|--|--|---|
| ☒ Customer Care | ☒ Account Notification | ☐ Delivery Notification | ☐ Security Alert |
| ☐ 2FA | ☐ Fraud Alert | ☐ Higher Education | ☐ Polling and Voting |
| ☐ Public Service Announcement | ☐ Marketing | | |

Campaign Description * (edit the suggested text to fit how you will actually use texting)

Suggested: [Business name] uses text messaging for one-to-one conversations between our staff and the families we serve, and with others who contact us. Staff use it to confirm arrangement meetings, share visitation and service details, coordinate paperwork, flowers, and memorial items, and answer questions. We do not send marketing or bulk messages, and we never use purchased or shared contact lists.

How do people agree to receive texts from you? * (check all that apply, and describe below)

- ☐ They text us first ☐ Verbal consent (see page 3) ☐ Signed arrangement / intake form ☐ Website form with checkbox

Example: During the arrangement conference, the director asks whether the family would like updates by text. If yes, the mobile number and the consent are recorded in the case file. Families may also text our main number first. Anyone can reply STOP at any time to opt out.

Messages contain links? ☐ Yes ☐ No

Messages contain phone numbers? ☐ Yes ☐ No

Lending or loan arrangements? ☐ Yes ☒ No

Age-gated content (alcohol, etc.)? ☐ Yes ☒ No

If your messages will ever include a website link or a phone number, answer Yes. A mismatch between these answers and your sample messages is a common rejection reason.

Continue on the next page

3. Sample Messages

Carriers want at least two samples that show real conversations, with your business name in them. Use these as written (swap in your name) or edit them to match how your staff actually texts. TCR adds "Reply with 'STOP' at any time to stop receiving messages." to each sample automatically.

1. Customer Care	Hi Margaret, this is Tom at [Funeral Home Name]. The draft obituary is ready for you to look over. Would you like me to send it by email, or would you rather go through it together by phone this afternoon?
2. Account Notification	[Funeral Home Name]: Confirming your arrangement meeting tomorrow, Thursday, at 10:00 AM. If you'd like photos included in the tribute video, please bring them along. Reply here if you need a different time.
3. Customer Care	Thank you for your message, Mr. Alvarez. Visitation will be Friday from 4 to 7 PM in our main chapel, with the service Saturday at 11 AM. Please let us know if any family traveling in would like help finding lodging. - [Funeral Home Name]
4. Account Notification	Hi Denise, it's Sarah from [Funeral Home Name]. The certified death certificates you requested are ready. You're welcome to pick them up weekdays 9 to 5, or we can mail them to you, whichever is easier.
5. Customer Care	[Funeral Home Name]: The flowers and memorial folders have arrived. Is there a time this week that works for you to stop by and see them before Saturday?

Required automatic replies (Heritage configures these for you):

Opt-in confirmation	[Funeral Home Name]: You'll now receive text messages from us about your arrangements and services. Msg frequency varies. Msg & data rates may apply. Reply HELP for help, STOP to opt out.
HELP reply	[Funeral Home Name]: For help, call us at (XXX) XXX-XXXX or email [support email]. Reply STOP to opt out.
STOP reply	[Funeral Home Name]: You have been unsubscribed and will receive no further messages from us.

4. Website and Policy Checklist (have these in place before we submit)

Your website

- Live and complete on your own domain (not "under construction", not a Facebook page only).
- Shows the same business name you put on this form (legal name or DBA), plus your address, phone, and email.
- Carriers check the site against the registration. If they can't connect the two, the campaign is rejected and vetting fees can be charged again on resubmission.

Privacy policy (linked from your website)

- Explains what information you collect and how you use it.
- Includes a texting statement along these lines: *"No mobile information will be shared with third parties or affiliates for marketing or promotional purposes. Text messaging opt-in data and consent will not be shared with any third parties."*

Texting terms (on your website, either their own page or a section of the privacy policy)

- What messages people will get and why; that message frequency varies; "Msg & data rates may apply".
- How to get help (reply HELP, or your phone/email) and how to stop (reply STOP), plus a link to the privacy policy.

Consent

- Only text people who gave you their number and agreed to texts, or who texted you first. Keep a note of when and how.
- If you collect consent on a web form, the texting checkbox must be unchecked by default and optional, with the disclosure (business name, frequency, rates, HELP/STOP, privacy link) next to it.
- On paper consent: use the same line on every intake form. **Verbal consent needs written backup:** a script, a consent log, and published texting terms that describe it. Samples are on page 3.

Common reasons registrations get rejected

- Legal name, EIN, or address that doesn't exactly match IRS records.
- Website missing, unreachable, or not clearly the same business; no privacy policy or texting terms.
- Sample messages that don't name the business, or that don't match the description or the link/phone answers above.
- Vague opt-in description ("customers opt in") instead of a specific account of how consent is collected.
- Brand Attestation PIN email not completed within 7 days.

5. Agreements

- ☐ We will collect and honor consent (opt-in), process STOP opt-outs, and answer HELP requests with our contact info.
- ☐ This campaign will not be used for affiliate marketing, and we will not text purchased or shared lists.

Authorized Name / Title Signature Date

6. Verbal Consent: Required Documents and Sample Language

Carriers can't hear a verbal opt-in, so they look for written proof that it happens the same way every time. If you collect consent verbally, have all four items below in place before we submit. Replace the bracketed text with your own details. This is sample language, not legal advice; have your attorney review it if you have one.

A. Staff script (read when asking for consent)

Every staff member who asks should use the same words. Keep a printed copy by the phone and in the arrangement room.

"Would it help if we sent you updates by text, things like meeting times, service details, and when paperwork is ready? The messages come from [Funeral Home Name] to the number you give us. How often depends on what's happening, and your carrier's message and data rates may apply. You can reply STOP at any time to stop, or HELP for our contact information. Our privacy policy is on our website. Is it all right if we text you at this number?"

Only a clear yes counts. If the answer is no or unsure, do not text that number. Saying no does not affect the services we provide.

B. Consent log (record every verbal opt-in)

Keep this in the case file or a shared log. Many attorneys recommend keeping records at least four years after the last message.

Name • mobile number • date and time • in person or by phone • staff member who asked • script version used • case or file number • date of opt-out, if any

Send the opt-in confirmation text (page 2) right after consent is given. That message is your written record that the conversation happened.

C. Text Messaging Terms (publish on your website, e.g. [yoursite.com/sms-terms](#))

This page is what the carrier reviewer reads to confirm your verbal opt-in. Link to it from your website footer.

Text Messaging Terms - [Funeral Home Name]

What we send. [Funeral Home Name] sends text messages to the families we serve and to people who contact us. Messages are about arrangements, meeting times, visitation and service details, documents, and answers to your questions. We do not send marketing messages.

How you sign up. Our staff will ask, in person or by phone, whether you'd like to receive texts. If you say yes and give us your mobile number, we record your consent and send a confirmation text. You can also text us first at [number]. Agreeing to texts is not required to use our services.

Frequency and cost. Message frequency varies. Message and data rates may apply.

Stopping. Reply STOP at any time. You will receive one confirmation and no further messages. To start again, reply START or tell our staff.

Help. Reply HELP, call [phone], or email [email].

Carriers are not liable for delayed or undelivered messages. See our Privacy Policy at [link].

D. Privacy policy text messaging section (add to your existing privacy policy)

Carriers look for this specific statement. It must appear in the privacy policy itself, not only in the texting terms.

Text Messaging. If you agree to receive text messages from [Funeral Home Name], we collect your mobile number and a record of your consent and use them only to communicate with you about our services. No mobile information will be shared with third parties or affiliates for marketing or promotional purposes. Text messaging opt-in data and consent will not be shared with any third parties. Information may be shared with service providers who help us deliver messages, such as our phone and messaging provider, solely for that purpose.

On the registration form: check "Verbal consent" on page 1 and describe it the same way your Text Messaging Terms do, including the web address of that page. A description that matches your published terms word for word is the fastest way through review.