



US Short Code Onboarding Overview



Agenda

Activation Process

Rules and Regulations

Examples

Testing

Migration Process

Activation

Activating a short code in the US is a 6-8 week process which is heavily dependent on campaign readiness. This means most of this time pertains to campaign review and editing.

Many campaigns are not ready to be filed with the carriers upon first presentation and we are here to help with the process of ensuring a campaign is compliant.





Rules and Regulations

Call to Action

All US Short code programs are required to have a call to action. This is how the program is advertised to the user and how consent is granted to receive messages. A Call to Action may be presented verbally (i.e. point of sale), via print ad (i.e. “text JOIN to xxxxx”) or via web (i.e. mobile number entry).

The Call to Action must include the following criteria:

- Program description
- Message frequency
- “Message and data rates may apply”
- Link to Terms & Conditions and Privacy Policy

Terms and Conditions

The brand’s terms and conditions page will be reviewed for the following criteria:

- Program name and description
- Message frequency
- “Message and data rates may apply”
- Customer care information (i.e. Reply HELP for help)
- Opt out instructions (i.e. Reply STOP to end)
- Link to Privacy Policy
- “Carriers are not liable for delayed or undelivered messages”



Rules and Regulations

Privacy Policy

It must be clear that the end user's personal information will not be shared or sold to third parties for the purpose of marketing. In other words, only the brand that the user specifically provides consent to, may send messages to that user. Lead generation is not permitted.

Message Flow

Recurring programs must send a confirmation message upon opt in. This is referred to as the opt in message, welcome message or initial message. All US Short codes are required to respond to HELP and opt out keywords (STOP, QUIT, CANCEL, END AND UNSUBSCRIBE) whether the program is recurring or one-time. See next page for required criteria for the opt in, help and opt out responses.



Message Flow



Opt in Message

- Program/brand name
- Message frequency
- “Message and data rates may apply”
- Customer care information (i.e. Reply HELP for help)
- Opt out instructions (i.e. Reply STOP to end)



Opt Out Response

- Program/brand name
- Confirmation that user has unsubscribed and
- will not receive any more messages



Help Response

- Program/brand name
- Contact info (email/phone/support web page)

*Only program name is required for one-time programs



Provisioning Timelines

The below table outlines the schedule and estimate timing for provisioning of new short codes. Please note this is from the time of carrier submission.

Operator	Provisioning Schedule	Estimate Timing
AT&T	Early Monday morning maintenance window (usually 2am)	1-2 weeks
Sprint/Boost/Virgin	Early Wednesday morning maintenance window (Virgin occurs on Thursday morning)	1-2 weeks
T-Mobile	No set provisioning cycle	1-2 weeks
Verizon	Early Friday morning maintenance window (usually 2-4am)	2-3 weeks
ClearSky	Wednesday maintenance window	1-2 weeks
US Cellular	No set provisioning cycle	1-2 weeks
Interop	No set provisioning cycle	3-5 weeks
ACG	No set provisioning cycle	1-2 weeks
Google Voice	No set provisioning cycle	1-2 weeks
Peerless	No set provisioning cycle	1-2 weeks
Claro/Open Mobile	No set provisioning cycle	3-4 weeks



Examples

Call to Action

Keyword

- Text {keyword} to XXXXX to receive {type of alerts} from {brand name}.
- {Message Frequency}. Message & Data rates may apply. Terms & Conditions and Privacy Policy: {link}

Web

- Enter your mobile number to receive {type of alerts} from {brand name}.
- {Message Frequency}
- Message & Data rates may apply
- Terms & Conditions and Privacy Policy: {link}

Verbal

“Would you like to receive {type of alerts} from {brand name}? {Message Frequency}. Message & Data rates may apply. Terms & Conditions and Privacy Policy can be found here: {link}”



Examples

Terms & Conditions

Recurring Programs

- [Program/Brand Name] Terms and Conditions
- [Program description]. Message and data rates may apply. [message frequency]. For help, reply HELP. To opt out, reply STOP. Carriers are not liable for delayed or undelivered messages.
- For our privacy policy, see here: [link to privacy policy]

One-time Programs

- [Program/Brand Name] Terms and Conditions
- [Program description]. Message and data rates may apply. For help, reply HELP. Carriers are not liable for delayed or undelivered messages.
- For our privacy policy, see here: [link to privacy policy]



Examples

Message Flow

Recurring Program

{Brand} Alerts: You have opted in to receive messages! Msg freq varies. Msg & Data Rates May Apply. Reply HELP for help. Reply STOP to cancel.

One-time Programs

{Brand}: Your one-time pin is xxxxx

Help Response

{Brand}: For help call 888-888-8888 or email example@example.com

Stop Response

{Brand}: You have been unsubscribed and will not receive any more messages.

Certification Testing

Upon carrier approval and provisioning, live testing is required before a campaign is certified. Sinch will test your short code in addition to AT&T and T-Mobile. We will begin testing once a client confirms the message responses have been configured on their end.

The process involves testing the opt in method, as well as HELP and STOP keywords, on each of our carrier handsets. This ensures that all carriers are provisioned correctly and that the carrier-approved messages are being sent.

*When testing prior to a campaign being certified, T-Mobile tests will only work on whitelisted devices. Our internal test devices are whitelisted for this purpose. Sinch can whitelist a T-Mobile number for you upon request.





Migration Process

Migrating a US Short Code from another aggregator to Sinch will follow a very similar process to a new short code set up. We will still require a campaign brief, short code receipt, CTA screenshot, in addition to the migration letter. We will schedule the migration according to the below table. Many carriers have specific maintenance windows for short code provisioning which sets when the migration will occur. The shortest “migration period” is 5 days (Monday – Friday).

Operator	Migration Schedule
AT&T	Early Monday morning maintenance window (usually 2am)
Sprint/Boost/Virgin	Early Wednesday morning maintenance window (Virgin occurs on Thursday morning)
T-Mobile	During a call which can be scheduled for any day
Verizon	Early Friday morning maintenance window (usually 2-4am)
ClearSky	Wednesday maintenance window
US Cellular	No set provisioning cycle
Interop	No set provisioning cycle
ACG	No set provisioning cycle
Google Voice	No set provisioning cycle
Peerless	No set provisioning cycle



Migration Process

Technical Migration Strategies

Scenario #1: (Implementation Complexity: Low (Sinch), High (Client) / Traffic Impact: Low)

With the Client being able to "scrub" their MSISDN database, this MT traffic migration strategy allows client to control routing on their side based on the OperatorID set in the inbound MOs to trigger the MT traffic switchover towards CLX.

Scenario #2: (Implementation Complexity: Low (Sinch), Low (Client) / Traffic Impact: High)

With the Client unable to "scrub" their MSISDN database and rely on Sinch Operator-Lookup during MT routing, Client has no control of routing on their side to segregate MT traffic to be routed between aggregators. In this scenario, Client will start forwarding 100% of the MT traffic for the short code being migrated immediately after the first carrier has completed the migration between aggregators. MT traffic from the migrated short code towards carriers that have not completed the migration yet will be rejected or failed. Client will retry sending the failed MT requests via the previous aggregator.

 **Thank you**