



AGREEMENT, PAYMENT & OWNERSHIP

Put the business rules in writing before setup begins.



1 STARTER SETUP

- ✓ Client-owned account and texting number
- ✓ One keyword and immediate auto-reply
- ✓ One tag and contact-specific form, when needed
- ✓ One delayed campaign, testing, and handoff



2 WRITTEN SCOPE

- ✓ Deliverables, exclusions, timeline, and revision limit
- ✓ Payment terms and setup payment before intake



3 NAME THE RESPONSIBLE PEOPLE

- ✓ Who approves campaign copy
- ✓ Who answers customer replies
- ✓ Who pays platform, registration, telecom, and credit costs



4 OWNERSHIP RULE

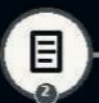
- ✓ Client owns the account, number, billing, data, consent records, and business records
- ✓ Operator uses Assistant Access when appropriate
- ✓ Remove operator access when the engagement ends



NO AGREEMENT. NO PAYMENT. NO BUILD.



CREATE ACCOUNT



REGISTER 10DLC



CHOOSE NUMBER



BUILD KEYWORD



LAUNCH & TEST



PREPARE THE REGISTRATION ASSETS

Gather everything before you open the submission.

1



BUSINESS IDENTITY

- ✓ Correct registration path
- ✓ Legal name, entity type, Tax ID, and address
- ✓ Business website or accepted online presence

2



CUSTOMER PATH

- ✓ Clear use case and campaign description
- ✓ Full customer-facing opt-in CTA
- ✓ Screenshot or proof of the CTA
- ✓ Terms & Conditions and Privacy Policy

3



MESSAGE SET

- ✓ At least two realistic samples for a Marketing campaign
- ✓ Welcome, STOP, and HELP messages
- ✓ Truthful link, phone-number, and age-gated declarations
- ✓ Written client approval
- ✓ Saved copy of everything submitted



CLEAN ASSETS IN. CLEANER REVIEW OUT.



Requirements can change. Verify the current platform registration fields before submission.



CREATE ACCOUNT



REGISTER 10DLC



CHOOSE NUMBER



BUILD KEYWORD



LAUNCH & TEST



TEST THE CUSTOMER PATH

Test the experience from the customer's side.



1

TEXT THE KEYWORD

Use a fresh phone number.



2

RECEIVE THE AUTO-REPLY

Confirm it arrives immediately.



3

OPEN THE FORM

Use the contact-specific link.



4

SUBMIT THE FORM

Enter sample data.



5

CHECK THE CONTACT

Verify the same record updated.



6

CHECK THE TAG

Confirm the correct tag applied.



7

CHECK THE CAMPAIGN

Confirm delayed enrollment.



8

PROOFREAD EVERYTHING

Business name, offer, dates, links, STOP/HELP.

READY?



reply is immediate



link opens on mobile



data lands on the correct contact



tag and delayed campaign are correct



STOP and HELP behave correctly



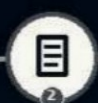
credits and sending settings are ready



Continue with launch settings, delivery checks, and final safeguards.



CREATE ACCOUNT



REGISTER 10DLC



CHOOSE NUMBER



BUILD KEYWORD



LAUNCH & TEST



HAND OFF OWNERSHIP & RECORDS

Transfer the system and the evidence clearly.



1 FINAL APPROVAL

- ✓ Written launch approval
- ✓ Final handoff sign-off
- ✓ Final texting number
- ✓ Registration status and approved use case



2 CLIENT OWNERSHIP

Client owns:

- ✓ Primary account and billing
- ✓ Texting number and data
- ✓ Consent records
- ✓ Business and campaign records



3 CUSTOMER-PATH FILES

- ✓ Approved opt-in sources and CTA proof
- ✓ Final customer-facing copy
- ✓ Terms and Privacy links
- ✓ Testing and approval records



4 BUILD INVENTORY

- ✓ Keyword, tag, form, and campaign names
- ✓ Broadcast Hours and time zone
- ✓ Message schedule and live URLs
- ✓ Change log and current status

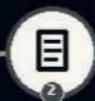
Client representative: _____ Date: _____ Operator: _____



**NO HANDOFF WITHOUT OWNERSHIP,
RECORDS, AND SIGN-OFF.**



CREATE ACCOUNT



REGISTER 10DLC



CHOOSE NUMBER



BUILD KEYWORD



LAUNCH & TEST