Better Ways Accounting

SMS Security & Consent Policy (10DLC-Compliant)

Effective Date: August 20, 2025

1. Purpose & Scope

This policy governs how Better Ways Accounting uses SMS communications via the Experteers UCaaS platform under 10-digit Long Code (10DLC) regulations. It applies to all clients, staff, and partners receiving SMS messages for business purposes, ensuring compliance with U.S. carrier standards, the Campaign Registry (TCR), and data privacy laws.

2. Required Recipient Consent (Explicit Approval)

Before sending any SMS, Better Ways Accounting must obtain **explicit opt-in consent** from message recipients, including:

- **Consent Statement:**
  "By opting your mobile number, you consent to receive SMS messages from Better Ways Accounting regarding [invoice reminders / tax updates / service notices]. Msg & data rates may apply. You may receive up to 10 messages per month."

- **Recorded Agreement:**
  Consent is required via one of the following documented methods:

  - Opt-in checkbox on a web form (default unchecked)

- **Documentation Fields to Capture:**

  - Date and time of consent

  - Channel (e.g., website, form, email, verbal)

  - Message purpose

  - Recipient's name and mobile number

3. Opt-Out ("STOP") & Help ("HELP") Instructions

Every SMS includes clear, easy opt-out and help instructions:

- **Unsubscribe:** "Reply STOP to unsubscribe."

- **Help:** "Reply HELP for assistance."

Recipients opting out are immediately suppressed from receiving further

messages. Any request for assistance (HELP) must be handled promptly by staff.

4. Privacy & Data Sharing

- **Privacy Statement:**
  "We will not share or sell your mobile number or opt-in status to third parties for marketing. It will only be used to deliver services you opted in for, or as required by law."

- **Third-Party Use:**
  If data is shared with trusted third-party providers (e.g., Experteers for SMS delivery), they are bound by strict confidentiality and usage limitations.

- **Legal Obligations:**
  Mobile information may be shared only when mandated by law (e.g., subpoenas or regulatory requests).

5. Security of SMS Data

Better Ways Accounting and Experteers commit to industry-standard security measures, including:

- Secure (encrypted) transmission and storage of opt-in data and messaging logs

- Access controls and authentication for staff

- Annual reviews of policy and compliance mechanisms

- Acknowledgement that no system is 100% secure—and users consent at their own risk, aligning with carrier and CTIA guidelines.

6. 10DLC Registration & Compliance

- **Brand & Use Case Registration:**
  Better Ways Accounting registers its brand with TCR and defines SMS campaign purposes (e.g., reminders, alerts). All campaigns include sample messages and opt-in proof.

- **Transparency:**
  Through the website and communications, the company discloses its identity and the purpose of messaging to recipients.

- **Message Limits:**
  Compliant throughput (approx. 1 message/sec, subject to carrier rules) is

maintained to avoid blocking or filtering.

7. Monitoring & Record Retention

- **Consent Records:** Retain for a minimum of **six years** to comply with carrier regulations.

- **Audit Log:** Maintain records of opt-ins, opt-outs, HELP queries, and message delivery statuses for compliance verification.

8. Updates to This Policy

We may modify this policy to reflect legal or carrier updates. Users will be notified by updating the "Effective Date" and via notifications on the website or via email.

Summary Table

Policy Area	User Requirements
Opt-In Consent	Explicit approval required before sending SMS
Opt-Out Mechanism	Must include "STOP" and "HELP" in every SMS
Privacy Commitment	No data sharing for marketing; only legal exceptions apply
Security Practices	Secure handling of data; no guaranteed 100% security
10DLC Compliance	Proper brand/campaign registration and sample message pre-approval
Records	Maintain logs for at least six years
Policy Revisions	Updates communicated via website or direct notifications