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 messaging under 10-digit Long Code (10DLC) regulations. It applies to all clients, staff, and partners who receive text messages for legitimate business communication purposes.

SMS messages are used only for customer communication related to services that clients have explicitly approved, such as appointment confirmations, document updates, or billing notices. Messages are never used for marketing or promotional purposes.

2. Customer Consent (Explicit Approval Required)

Before any SMS is sent, Better Ways Accounting must obtain explicit consent from the recipient. Consent is documented and verified prior to initiating any text communication.

Consent Statement Example:
"By providing your mobile number and explicitly opting in, you consent to receive SMS messages from Better Ways Accounting related to your accounting or tax services. Message and data rates may apply. You may opt out at any time by replying STOP."

Consent Record Requirements:

- Date and time of approval

- Method of consent (form, email, or verbal confirmation)

- Purpose of messaging

- Recipient's full name and mobile number

Consent must be renewed if the purpose of communication changes.

3. Opt-Out and Support Instructions

Every message sent must contain clear instructions to opt out or request help:

- Unsubscribe: "Reply STOP to unsubscribe."

- Assistance: "Reply HELP for assistance."

Once a recipient replies "STOP," their number is immediately removed from the SMS list, and no further messages will be sent. "HELP" responses are routed to designated staff for prompt attention.

4. Privacy and Data Use

Privacy Commitment:
Better Ways Accounting guarantees that:

- Customer phone numbers and consent records will never be sold, rented, or shared with any third party for marketing or solicitation purposes.

- SMS data is used solely to deliver communications directly related to client services.

- Data may only be shared with trusted providers (e.g., Experteers UCaaS system) under strict confidentiality for the sole purpose of secure message delivery.

Legal Disclosure:
Customer information will only be disclosed if required by law (e.g., subpoena, court order, or regulatory request).

5. Data Security & Compliance

All SMS consent and message records are stored securely and transmitted through encrypted channels.

Security Practices Include:

- Encrypted storage of consent forms and message logs

- Restricted employee access and authentication

- Annual compliance and security audits

Better Ways Accounting acknowledges that while every reasonable safeguard is in place, no communication system can be guaranteed 100% secure.

6. 10DLC Registration & Compliance

- Brand Registration: Better Ways Accounting is registered under The Campaign Registry (TCR) as a verified brand.

- Use Case Registration: Registered as "Customer Service Notifications."

- Transparency: All outgoing messages clearly identify the sender as "Better Ways Accounting."

- Message Throughput: All SMS are transmitted within carrier-approved limits and follow CTIA & TCR regulations.

7. Record Keeping

- Consent records are retained for a minimum of six (6) years.

- Opt-out, HELP, and delivery logs are maintained for compliance and audit purposes.

8. Policy Revisions

This policy may be updated as regulations evolve. Updates will be reflected by revising the Effective Date above and publishing the updated version on the company's website or notifying clients directly.

Summary Table

Policy Area	Requirement
Consent	Explicit approval before sending any SMS
Opt-Out	"STOP" and "HELP" must appear in every message
Privacy	No data sharing or marketing use
Security	Encrypted storage, limited access
Compliance	10DLC brand & use case registered
Retention	Records kept for six years minimum